SEVENTH FRAMEWORK PROGRAMME

Participant Portal

User's Guide

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Introduction 5
Typographical convention 5
Participant Portal's main actors 5
Participant Portal's main services 6
System requirements for using the Participant Portal 6
Where can the participants get support? 7
1 HOW TO ACCESS THE PARTICIPANT PORTAL? 8
1.1 European Commission's Authentication Service 8
1.2 ECAS Registration 8
1.3 Log on to the Participant Portal 11
1.4 Log out from the Participant Portal 13
2 HOW TO USE THE PARTICIPANT PORTAL? 14
2.1 Roles 14
2.1.1 Role basics 14
2.1.2 Identify your roles 16
2.2 The list search/filter box 18
2.3 Search for an organisation and retrieve its Participant Identification Code 18
2.4 Using the LFV Simulation tool 20
2.5 Register an organisation 21
2.5.1 Legal Entity Appointed Representatives and account administrators 24
2.6 Manage the organisation data 26
2.6.1 The organisation menu and organisation summary portlets 27
2.6.2 Status of my organisation 28
2.6.2.1 Check if your request has been validated or is in validation. 28
2.6.2.2 View organisation or change (within request history) 29
2.6.2.3 Create a change request 29
2.6.2.4 Delete change request 30
2.6.2.5 Update change request 30
2.6.3 View Projects of an Organisation 31
2.6.3.1 Project details 32
2.6.4 Roles of an Organisation 33
2.6.4.1 Add a role to an organisation 34
2.6.4.2 Revoke a role from an organisation 35
2.6.5 Proposals of an Organisation 35

2.7 Manage projects 37
2.7.1 Access to the list of projects and project details 37
2.7.2 The project menu and project summary portlets 38
2.7.3 Roles of a Project 39
2.7.3.1 First level: Primary Coordinator Contact 40
2.7.3.2 Second level: Participants Contacts (including Coordinator Contacts) 40
2.7.3.3 Third level: Financial Signatories, Task Managers and Team Members 40
2.7.3.4 Other roles: 40
2.7.3.5 Display Roles 41
2.7.3.6 Add a new role in your project 42
2.7.3.7 Revoke a role from your project 43
2.7.3.8 Manage the Consortium (or Manage Participants) 44
2.7.4 Access to the negotiations activities (Negotiation Facility tool -NEF) 45
2.7.5 Access to the reporting activities 48
2.7.5.1 Accessing the reporting functions 48
2.8 Manage roles 49
2.9 Manage notifications 50
2.9.1 Notifications 50
2.9.1.1 Columns in the Inbox tab 51
2.9.1.2 Buttons 51
2.9.1.3 Notification content 52
2.9.1.4 Example of an e-mail notification 53
2.9.1.5 Notification and event 54
2.9.1.6 Preferences 54
2.9.2 Subscription Criteria 56
2.9.3 Your Subscribed Calls 58
2.10 Manage Funding 60
2.10.1 Calls by Framework Programmes 60
2.10.2 Calls by specific programme 61
2.10.3 Call info 62
2.10.4 Search Calls 63
2.11 Manage Experts 64
2.11.1 Not logged in users 64
2.11.2 Logged in users without Expert profile defined in EMPP 65
2.11.2.1 Import Expert profile from CORDIS 68

2.11.2.2 Recover CORDIS profile 70
2.11.3 Logged users with Expert profile imported from Cordis 70
2.11.4 Logged in users with Expert profile defined in EMPP 71
2.12 Logged in users with JTI Representative or Member State Representative role 71
2.13 RSS 72
2.13.1 What is the RSS format? 72
2.13.2 How to access RSS feeds 72
2.13.3 What do they look like? 72
2.13.4 Step by step 73
2.13.4.1 How can I read RSS feeds? 73
2.13.4.2 How do I get a news reader? 73
2.13.4.3 Webmasters 73
2.13.5 Research Participant Portal RSS feeds 75
4 GLOSSARY 78

Introduction

The Participant Portal is an Internet portal for the participants to the 7th Framework Programme (FP7) and the Competitiveness and Innovation Programme (CIP). Its ultimate aim is to become over time the participants' gateway and single entry point to interact with the Research programmes of the European Commission.

It provides a consistent and coherent set of online services in order to facilitate the participants' interactions with the Research Directorates-General of the European Commission and improve operations and data quality. It will eventually host a full range of web applications **that facilitate the monitoring and the management of proposals and projects** throughout their lifecycle.

This document describes how to access and use the Participant Portal (PP).

Typographical convention

Hyperlink or *email address*
[Button]
"Tab"
Figure or **Table**
<Field> or <Column>

Participant Portal's main actors

The different types of users defined for the Participant Portal are organised by roles and are globally described as follow[1]:

- Public : Any person that goes to the PP URL
- Registered User:
  A user that has registered himself and has received credentials for logging on.
  A registered user can be a natural person or a member of a legal entity.

  A member of a legal entity can have one of the following roles:

  - Researcher:
    Person who directly or indirectly interacts with Framework Programme information
  - Organisation Member : User who acts on behalf of an entity
    - Self registrant : user who self-registered an organisation in the **Unique Registration Facility**
    - Legal Entity Appointed Representative (LEAR):,
      possibly delegating updates of company information and other capabilities to other representatives of the organisation, called "Account Administrators" (AA) under the Participant Portal:
      - Account Administrator (AA): the Account Administrator is appointed by the LEAR in order to provide support with the management of the organisation data.
  - Project/Proposal Participant :
    Member of an organisation who participates in a project or a proposal

[1] Thorough descriptions of the available roles are given in sections 2.5.1 (Legal Entity Appointed Representatives and account administrators) and 2.7.3 (Roles of a Project).

- Primary Coordinator Contact:
  Coordinator of a project/proposal who is the first point of contact between a Consortium[2] and the European Commission.
- Participant Contact:
  Primary point of Contact for an organisation within a Consortium
- Coordinator Contact:
  a Participant Contact who belongs to the same organisation as the Primary Coordinator Contact.
- Team Member:
  Has minimal read-only rights to project resource information. For the majority of users the role represents a *project team member*.
  They can be designated by a Coordinator or Participant Contact of the same organisation
- Task Manager:
  Extends the Team Member role with the capability to perform submit, update and delete actions. Like the Team Member, they can be designated by a Coordinator or Participant Contact of the same organisation.
- Financial Signatory:
  a person nominated by the LEAR or the Account Administrators (on behalf of legal representative) that will be entitled to sign the financial statements (form-C) for the beneficiary of a project.

Depending on their role(s), users will receive different rights regarding the access to the hosted services.

Participant Portal's main services

The Participant Portal has been created to cover the whole lifecycle of the projects: proposals submission, evaluation, grant agreement negotiations and submission of periodic and final reports during project implementation, administrative support to the experts…
Currently, the Participant Portal is the gateway to access

- the **Unique Registration Facility** (URF), allowing organisations registration and data management
- the **FP7 Negotiation Facility** (NEF), facilitating the negotiation process
- the **reporting tools** (NEF, SESAM, FORCE) to submit the technical and financial reports
- the **Funding** database
- the FP7 Documentation (Documents)
- the **Notification** service
- the **Legal and Financial Viability** (LFV) simulation tool
- the **proposal system** services
- the **expert** database

System requirements for using the Participant Portal

[2] A Consortium is a group of Participants (or Beneficiaries) formed in pursuit of a Project.

The participant portal operates on-line, without saving anything on the computer. The recommended minimum system requirements are:

- a computer with a minimum 1.2 GHz processor and minimum 1Gb RAM;
- an Internet connection, preferably 1Mb/s or higher;
- a screen with a minimum resolution of 1024 x 768;
- Internet Explorer 8.0 (or above) or Firefox 8.0 (or above). Other web browsers may work but have not been tested. Note that for security reasons your browser may request to identify the Participant Portal website and the ECAS system as "trusted". Once added as trusted, we recommend that you restart your browser session. If you encounter issues with previous versions of browsers we recommend that you first upgrade to the minimum browser version indicated before contacting the helpdesk;
- Windows (XP, 7), Mac OS X 10.7 (Lion). Other operating systems may work but have not been tested.

Where can the participants get support?

A Frequently Asked Questions section is available on the Participant Portal.

The users looking for help with the Participant Portal and its underlying services should use
The contact form http://ec.europa.eu/research/participants/portal/page/contactus
or send an email to *EC-RESEARCH-IT-HELPDESK@ec.europa.eu.*

For issues related to the registration and login using the European Commission's Authentication Service (ECAS), participants can visit this website https://webgate.ec.europa.eu/cas/help.html or send an e-mail to *DIGIT-USER-ACCESS@ec.europa.eu*.

For questions related to the Framework and similar RDG Programmes, the participants are invited to contact the Research enquiry services via the following link: http://ec.europa.eu/research/enquiries.
The FP7 Help Desk can also be contacted by sending an e-mail to *EC-FP7-IT-HELPDESK@ec.europa.eu*.

1 HOW TO ACCESS THE PARTICIPANT PORTAL?

Except for a few services, such as Documents, Funding, LFV simulation tool or the PIC search function, access to the Portal and its underlying services requires an ECAS account.

1.1 European Commission's Authentication Service

ECAS is the **E**uropean **C**ommission's **A**uthentication **S**ervice.

It provides a single sign-on across a large number of Commission information systems: once you have authenticated yourself to ECAS, you do not have to re-enter your credentials (username and password) within the same browser session.

Protected information systems request ECAS to supply the current user's identity – if you have already been authenticated, it does not ask you to do so again (provided that you have not disabled the use of cookies in your browser).

ECAS authentication is available only with applications that have been specifically adapted to use it. These applications request ECAS to authenticate you on their behalf and do not authenticate you directly. This means that when you use your ECAS password, it will always be on a distinctive page belonging to ECAS, even though you may have typed in the application's address, not that of ECAS. Never enter your ECAS password on any other page.

Do not divulge your ECAS password to anyone - there is no reason for anyone else, including system administrators and support staff, to ask for it or know it.

1.2 ECAS Registration

If you are a new user please register on the ECAS. The creation of the ECAS account is free and easy.

1. To create your ECAS account, go to the Participant Portal home page: *http://ec.europa.eu/research/participants/portal*. (see Figure 1: Participant Portal home page)

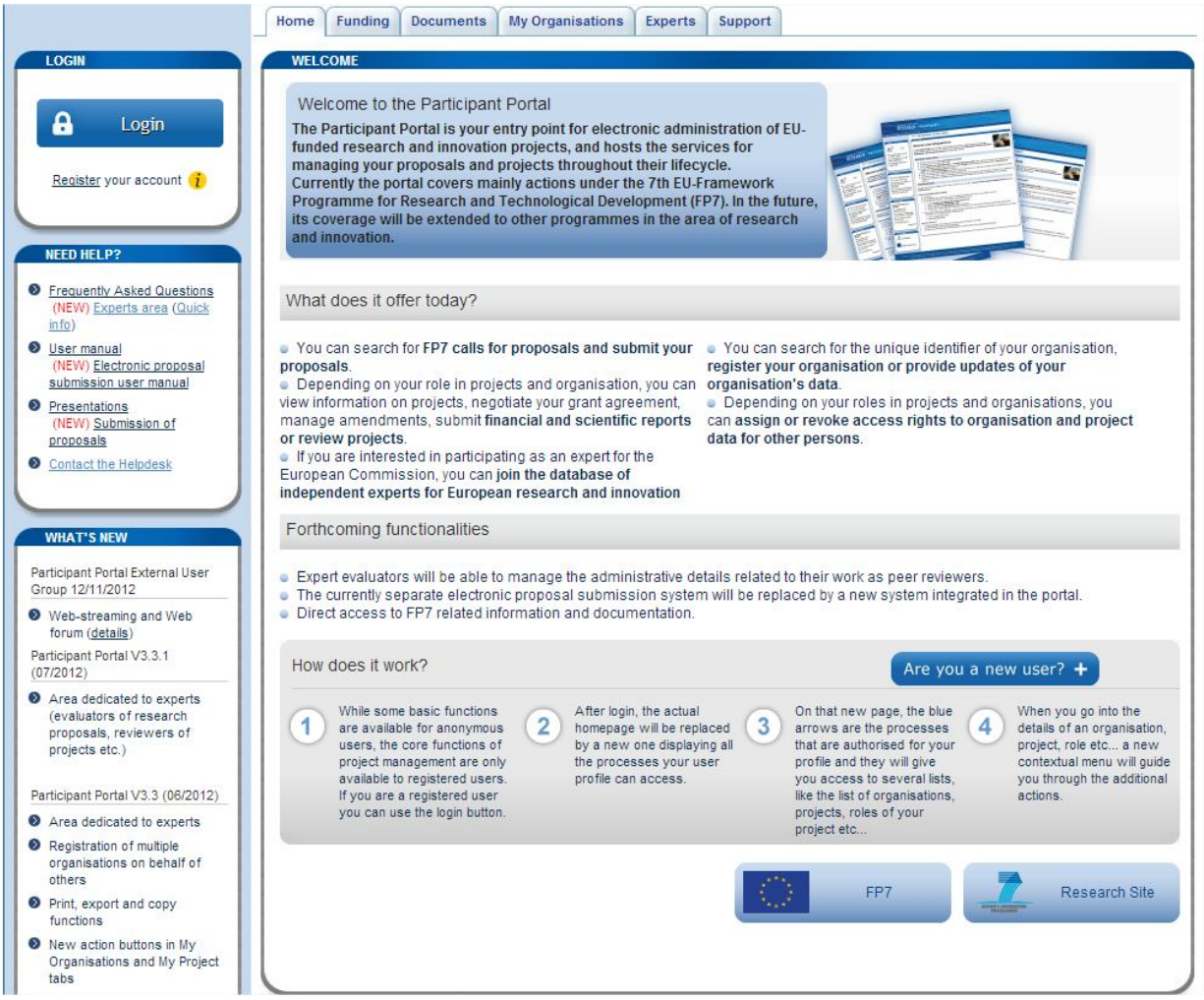

Home
Funding
Documents
My Organisations
Experts
Support
LOGIN
Login
Register your account
NEED HELP?
Frequently Asked Questions (NEW) Experts area (Quick info)
User manual (NEW) Electronic proposal submission user manual
Presentations (NEW) Submission of proposals
Contact the Helpdesk
WHAT'S NEW
Participant Portal External User Group 12/11/2012
Web-streaming and Web forum (details)
Participant Portal V3.3.1 (07/2012)
Area dedicated to experts (evaluators of research proposals, reviewers of projects etc.)
Participant Portal V3.3 (06/2012)
Area dedicated to experts
Registration of multiple organisations on behalf of others
Print, export and copy functions
New action buttons in My Organisations and My Project tabs
WELCOME
Welcome to the Participant Portal
The Participant Portal is your entry point for electronic administration of EU-funded research and innovation projects, and hosts the services for managing your proposals and projects throughout their lifecycle.
Currently the portal covers mainly actions under the 7th EU-Framework Programme for Research and Technological Development (FP7). In the future, its coverage will be extended to other programmes in the area of research and innovation.
What does it offer today?
You can search for FP7 calls for proposals and submit your proposals.
Depending on your role in projects and organisation, you can view information on projects, negotiate your grant agreement, manage amendments, submit financial and scientific reports or review projects.
If you are interested in participating as an expert for the European Commission, you can join the database of independent experts for European research and innovation
You can search for the unique identifier of your organisation, register your organisation or provide updates of your organisation's data.
Depending on your roles in projects and organisations, you can assign or revoke access rights to organisation and project data for other persons.
Forthcoming functionalities
Expert evaluators will be able to manage the administrative details related to their work as peer reviewers.
The currently separate electronic proposal submission system will be replaced by a new system integrated in the portal.
Direct access to FP7 related information and documentation.
How does it work?
Are you a new user?
1 While some basic functions are available for anonymous users, the core functions of project management are only available to registered users. If you are a registered user you can use the login button.
2 After login, the actual homepage will be replaced by a new one displaying all the processes your user profile can access.
3 On that new page, the blue arrows are the processes that are authorised for your profile and they will give you access to several lists, like the list of organisations, projects, roles of your project etc...
4 When you go into the details of an organisation, project, role etc... a new contextual menu will guide you through the additional actions.
FP7
Research Site

Figure 1: Participant Portal home page

2. Then click on the **[Are you a new user?]** and then on *"This link"* (see Figure 2: Register as new user).

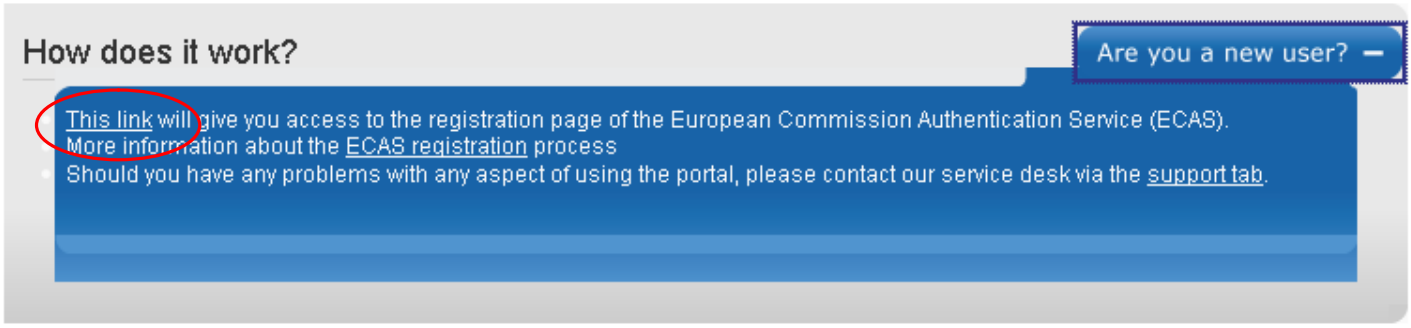

How does it work?
Are you a new user?
This link will give you access to the registration page of the European Commission Authentication Service (ECAS).
More information about the ECAS registration process
Should you have any problems with any aspect of using the portal, please contact our service desk via the support tab.

Figure 2: Register as new user

3. The ECAS User Registration Form opens: please fill it in using your individual professional e-mail address in the relevant fields (Figure 3: ECAS User Registration Form). It allows the system to identify you and credit you with the right access and services.

Please avoid using your email address as Username; this could cause issue if your email address is modified.

4. Select the privacy statement acknowledgement checkbox, copy the security code into appropriate text area and submit the form for processing.

Contact | Search | Legal notice | Privacy Statement
English (en)
External
European Commission Authentication Service (ECAS)
EUROPA > Authentication Service > Sign Up
Is the selected domain correct? External Change it
Login
New password
Sign Up
Help
ECAS
authenticates your identity on European Commission websites
Sign Up
Help for external users
Choose a username
First name *
Last name *
E-mail *
Confirm e-mail *
E-mail language *
English (en)
Try another
Audio version
Enter the code *
Privacy statement: by checking this box, you acknowledge that you have read and understood the privacy statement *
Sign up
* Required fields
Last update: 17/01/2012 (2.2.0-m) | 5 ms | Top

Figure 3: ECAS User Registration Form

5. The confirmation screen indicates that within a few minutes you will receive an email allowing you to complete the registration process. **Note that the process must be completed within 1h30 after your original request!**
6. Go to your mail box. You will see that the European Commission Authentication Service has sent you a message to initialise your password. Open it and click on the link indicated in the e-mail: you will be redirected to the Password initialisation page of ECAS (Figure 4: Password initialisation page of ECAS).

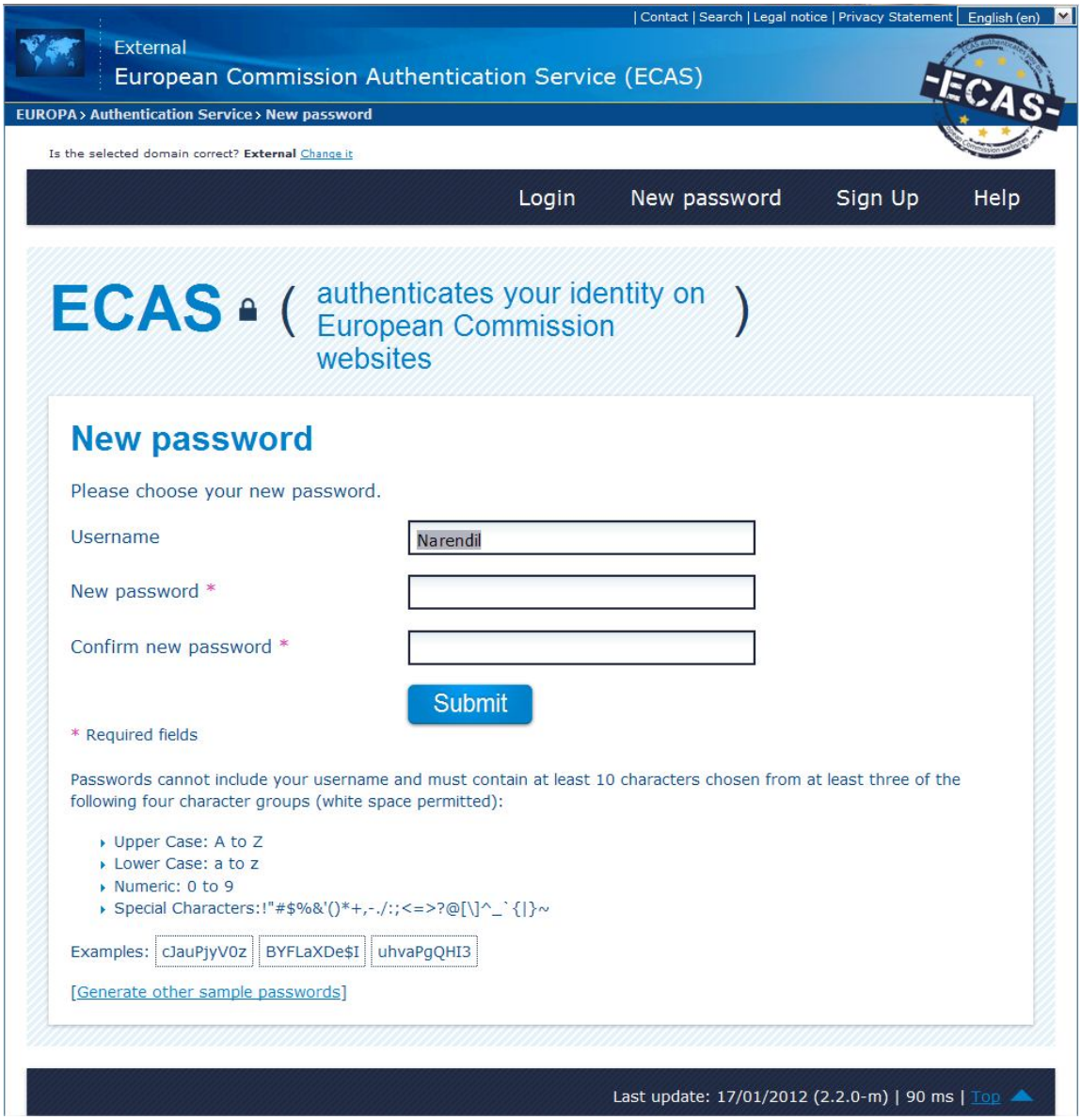

| Contact | Search | Legal notice | Privacy Statement English (en)
External
European Commission Authentication Service (ECAS)
EUROPA › Authentication Service › New password
Is the selected domain correct? External Change it
Login
New password
Sign Up
Help
ECAS (authenticates your identity on European Commission websites)
New password
Please choose your new password.
Username
Narendil
New password *
Confirm new password *
Submit
* Required fields
Passwords cannot include your username and must contain at least 10 characters chosen from at least three of the following four character groups (white space permitted):
Upper Case: A to Z
Lower Case: a to z
Numeric: 0 to 9
Special Characters:!"#$%&'()*+,-./:;<=>?@[\]^_`{|}~
Examples: cJauPjyV0z BYFLaXDe$I uhvaPgQHI3
[Generate other sample passwords]
Last update: 17/01/2012 (2.2.0-m) | 90 ms | Top

Figure 4: Password initialisation page of ECAS

7. On the password initialisation page create and initialise your password.
8. Click on the **[Submit]** button. The ECAS password initialisation success page will appear: your ECAS password was successfully initialised.
9. You can return to the home page of the Participant Portal. It is now possible to log on.

Please note that your ECAS credentials are strictly personal and confidential and should not be shared! They will allow you to access different services and data that might be critical for your organisation.

1.3 Log on to the Participant Portal

1. Go to the Participant Portal home page: *http://ec.europa.eu/research/participants/portal*
2. In the login box click on the login link (see Figure 5: Login box)

Figure 5: Login box

The login page (ECAS authentication) appears (Figure 6: ECAS Login page):

- Whenever you login, please make sure that the selected domain is “external”. Should another domain be selected, please change it by clicking on the *use a different domain* link.
- Enter your <Username> (if you have created one) or your <email address> and your <password>, and click on the **[Submit]** button.
- You are then redirected to the secured environment of the Participant Portal.

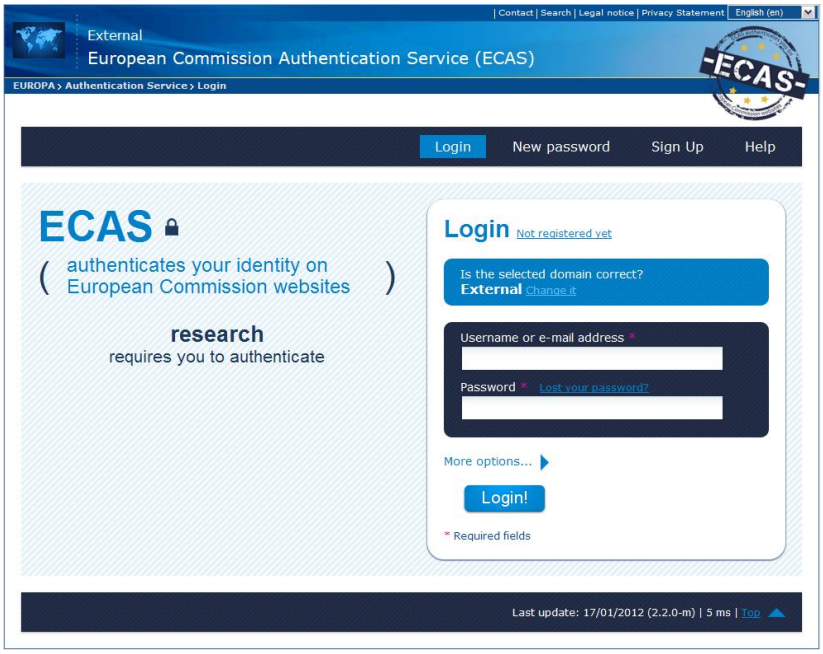


Figure 6: ECAS Login page

3. Now that you have logged on to the Participant Portal, you are identified as a user (Figure 7: Login box)

LOGIN
Logout
Christian HUWAERT
In addition to logging out, you must close all your browser windows to avoid any unauthorised access

Figure 7: Login box

Depending on your role, you will be able to access different services.

1.4 Log out from the Participant Portal

1. In the login box of the Participant Portal click on the **[Logout]** button (Figure 7: Login box)
2. This will end your session in the Participant Portal and **close all the applications accessed via the Participant Portal and supported by the ECAS authentication (URF, NEF, SESAM, and FORCE).**

2 HOW TO USE THE PARTICIPANT PORTAL?

2.1 Roles

2.1.1 Role basics

Every user will benefit from different rights, crediting them with access to specific information and services. Once a user has been authenticated, the list of actions that can be performed in a FP7/CIP project context depending on the user's role is displayed (see Figure 8: Home Page after login).

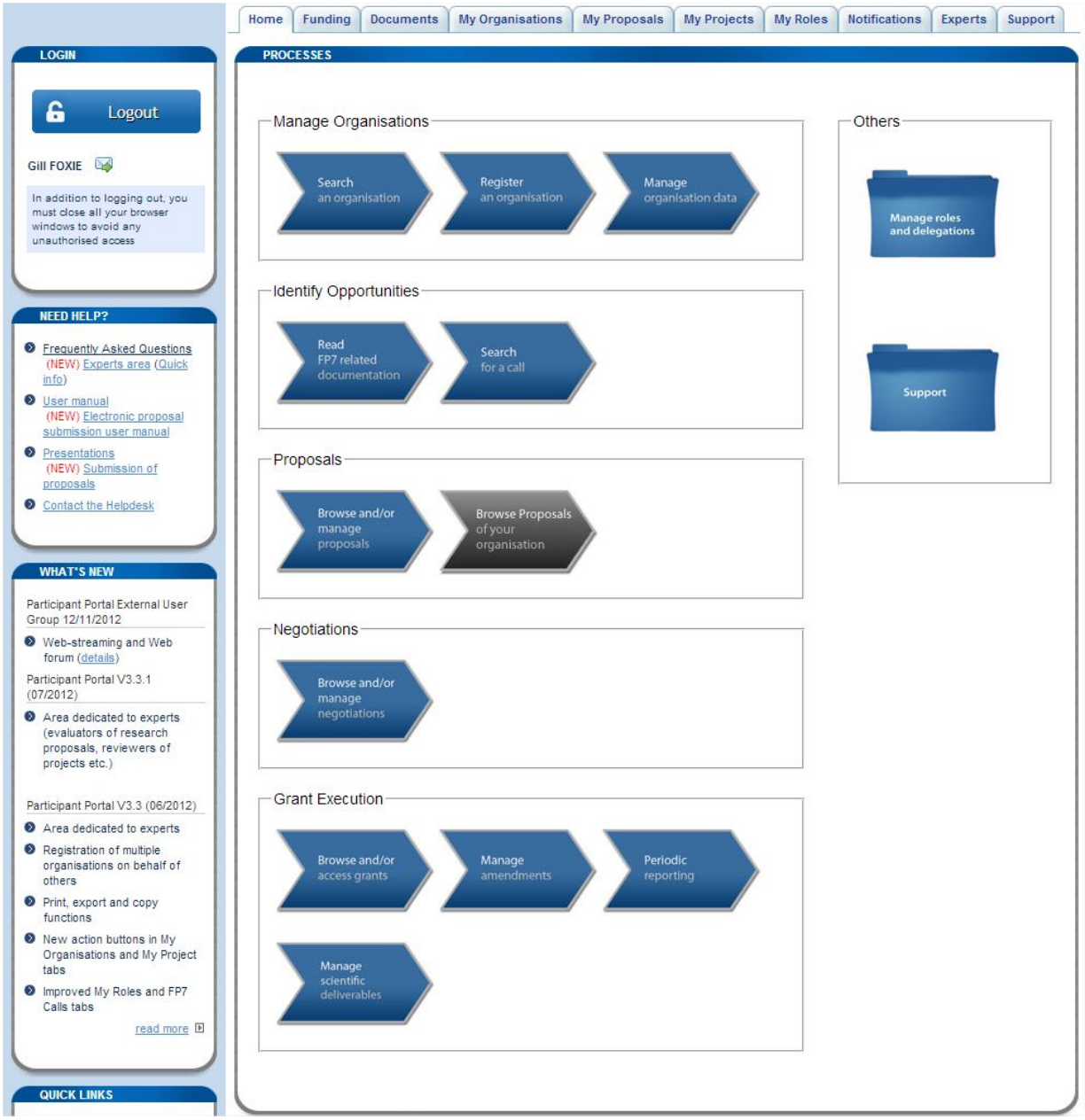


Figure 8: Home Page after login

"Table 1 – Processes" below describes the processes indicated in this graphical representation.
The columns are:

- PROJECT LIFE CYCLE STAGE
- SERVICES related to the stage

  ROLES: The roles for which the services are available.

PROJECT LIFE CYCLE STAGE	SERVICES	ROLES
Organisation management	Search for an organisation	Any
	Register an organisation	Any
	Manage registered organisation data, upload documents (until validation)	Self-Registrant
	Manage organisation data	LEAR, Account Administrator,.
	LFV Simulation	Logged or not logged users
Identify opportunities	Read FP7 related documentation	Any
	Search for a call	Any
Negotiations	Browse and/or manage Negotiations	Participant Contact, Coordinator Contact, Task Manager, Team Member.
Grant execution	Browse and/or manage Grants[3]	Participant Contact, Coordinator Contact, LEAR, Account Administrator ,Task Manager, Team Member
	Browse and/or manage Amendments	Participant Contact, Coordinator Contact, Task Manager, Team Member
	Browse and/or manage financial periodic and final reporting	Participant Contact, Coordinator Contact, Task Manager, Team Member
	Browse and/or manage deliverables and final reporting	Participant Contact, Coordinator Contact, Task Manager, Team Member
Horizontal processes	Manage roles and nominations	Any role
	Manage notifications	Any role
	Support	Any

Table 1 – Processes

[3] LEAR, Account Administrator and Team Member can only browse some information

2.1.2 Identify your roles

Every user will benefit from different rights, crediting them with access to specific information and services. These rights are related to the role(s) the user plays within an organisation (as a LEAR or Account Administrator) and/or a project (as a Coordinator, Participant, Representative, Task Manager or Team Member). You can identify your role(s) by following these instructions:

1. Log on to the Participant Portal
2. Select the **"My Roles"** tab.
3. If you have one or more organisation role(s) (i.e. LEAR or Account Administrator), a list of each organisation for which you have these roles will be displayed in the "Organisation Roles List" section. The list consists of the **P**articipant **I**dentification **C**ode (PIC), the name of the organisation and the role you are playing (Figure 9: My Roles).
4. If you have one or more project role(s) (i.e. coordinator, participant, task manager, team member, reviewer or rapporteur, EC Project Officer), a list of each project for which you have these roles will be displayed under the Project Roles section.
   The list consists of the Acronym of the project, the project identification number, the funding programme to which the project belongs, your role in the project (if you have multiple roles in the project, there will be one line per role).

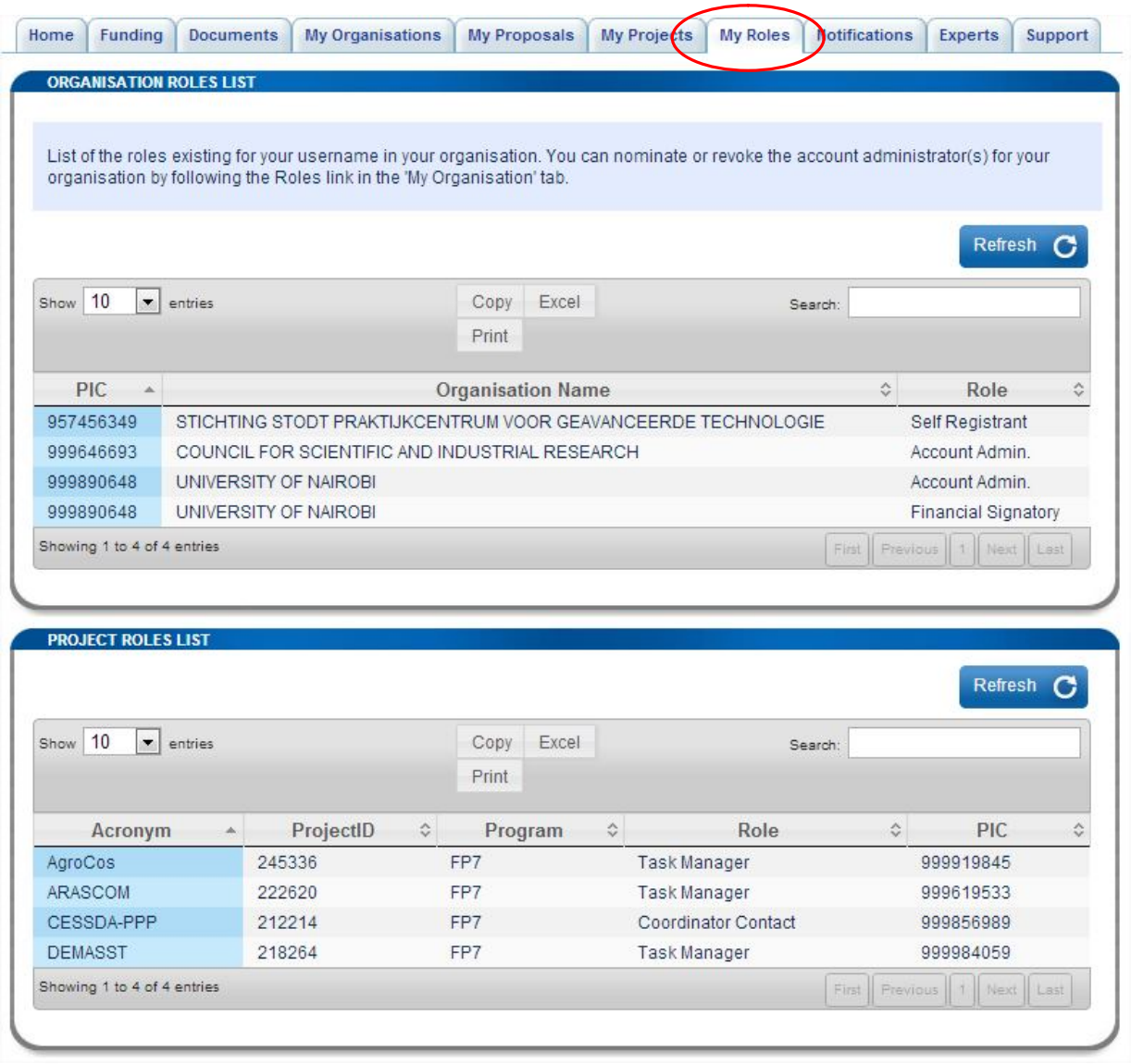


Figure 9: My Roles

Select the Refresh icon in order to refresh the memory cache; it allows reloading the most recent data.

2.2 The list search/filter box

You can use the Search box to filter out any list displayed by the participant portal. Simply start typing the word to filter on and the list will dynamically adapt itself in order to show you only the relevant lines.
The filtering is done on all the fields of the table.

Figure 10: The search/filter box

2.3 Search for an organisation and retrieve its Participant Identification Code

It is possible to check if an organisation has already registered by retrieving its PIC. However the search module provided on the Participant Portal will only retrieve the name and PIC of validated or under validation organisations. So if you have just registered your organisation, your PIC will not be displayed until the validation of your registration request has started.

1. Under the **"My Organisation"** tab, select the **"Search"** tab
2. The search Legal Entity module appears (Figure 11 - Search Legal Entity)
3. There you can check whether your organisation has already registered and if so, retrieve the PIC that has already been assigned. It is obligatory to complete **either** the <legal name> field **or** the <VAT number> field with at least a three character string. The other search fields can be left blank (Figure 12: Search Results)
4.

Note: if searching for a legal name in the national language does not yield results you might try with a translation in English

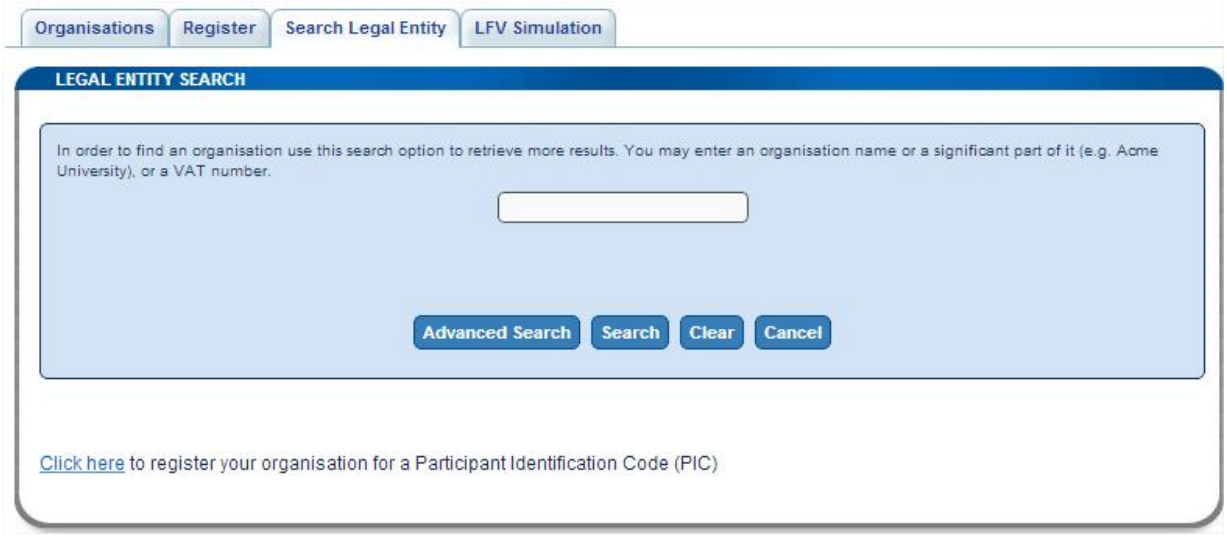

Organisations
Register
Search Legal Entity
LFV Simulation
LEGAL ENTITY SEARCH
In order to find an organisation use this search option to retrieve more results. You may enter an organisation name or a significant part of it (e.g. Acme University), or a VAT number.
Advanced Search
Search
Clear
Cancel
Click here to register your organisation for a Participant Identification Code (PIC)

Figure 11 - Search Legal Entity

Note: When your search returns too many results only the first 200 are shown. You should refine your search criteria

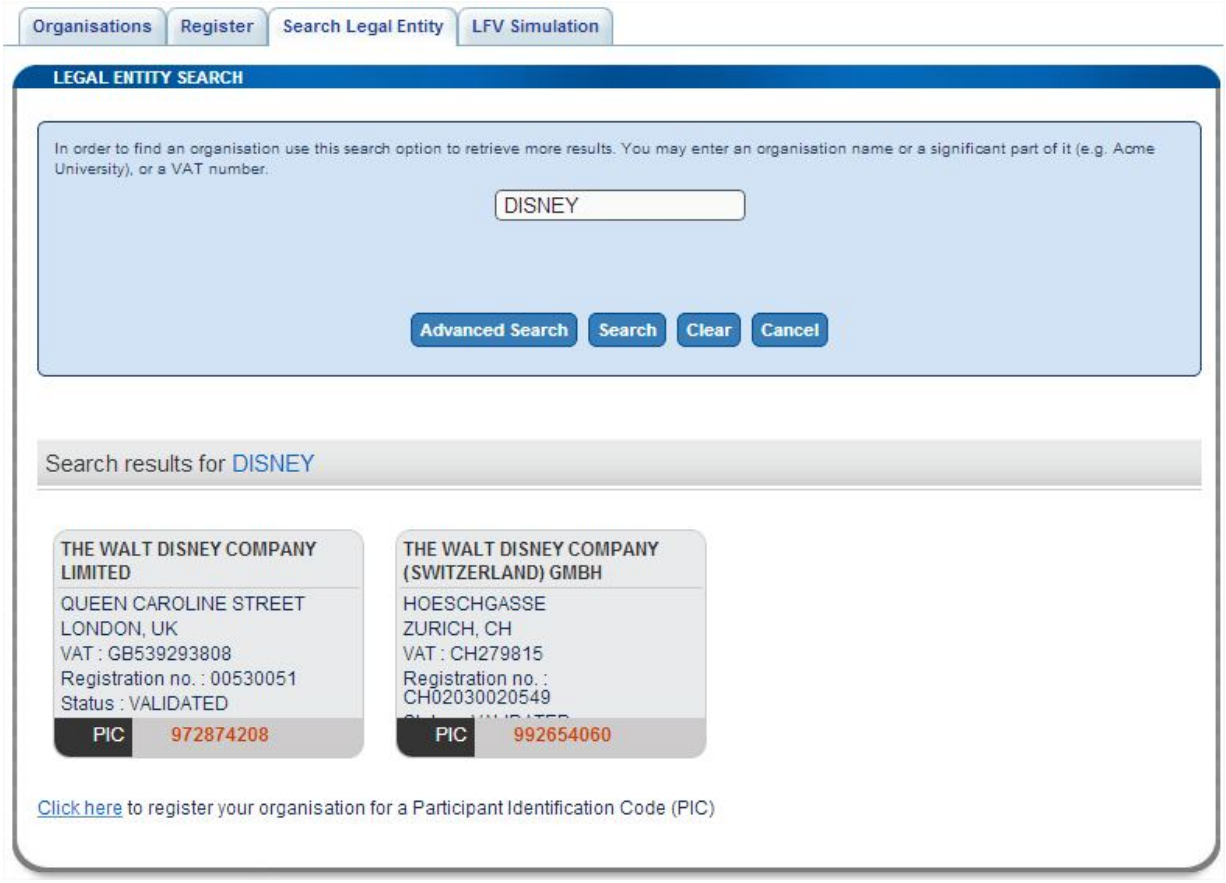

Organisations
Register
Search Legal Entity
LFV Simulation
LEGAL ENTITY SEARCH
In order to find an organisation use this search option to retrieve more results. You may enter an organisation name or a significant part of it (e.g. Acme University), or a VAT number.
DISNEY
Advanced Search
Search
Clear
Cancel
Search results for DISNEY
THE WALT DISNEY COMPANY LIMITED
QUEEN CAROLINE STREET
LONDON, UK
VAT : GB539293808
Registration no. : 00530051
Status : VALIDATED
PIC 972874208
THE WALT DISNEY COMPANY (SWITZERLAND) GMBH
HOESCHGASSE
ZURICH, CH
VAT : CH279815
Registration no. : CH02030020549
PIC 992654060
Click here to register your organisation for a Participant Identification Code (PIC)

Figure 12: Search Results

This feature is also available when you are not logged in (but there is an additional field to be filled for the security code).

As explained in section 2.2, you can use the Search box to filter out any list displayed by the participant portal.

2.4 Using the LFV Simulation tool

Any user (logged in or not) has the ability to perform a simulation related to the legal and financial viability (LFV) of his organisation. This simulation tool does not save the data on any server of the European Commission. The data is lost when the tool is closed.
If the user is not logged in then a verification code is asked before launching the ratio's calculation.
Just go on the **"LFV Simulation"** tab and click on the **[Go to LFV simulation]** button in order to launch the LFV simulation tool (see Figure 13: LFV simulation tab).

In this tool (see Figure 14: LFV Simulation tool), you have to enter balance sheet data (assets and liabilities) and data related to profit and loss account.
When done, you can launch the financial viability simulation by clicking the **[Calculate]** button. If you are not logged in you have to fill the verification code first.

Organisations
Register
Search Legal Entity
LFV Simulation
LFV SIMULATION
Warning / Disclaimer
The Commission services provide this user-friendly electronic tool for applicants so that they could simulate their financial viability check for their own information. The results of this simulation provide non-binding indications; they do not pre-empt the results of a formal financial viability check by the Commission services.
If a formal financial viability check by the Commission services is required for a participation in a project, either the LEAR of your organisation will be invited to submit data via the Portal or the Commission officer will inform you what steps should be followed.
The simulation tool uses the ratios described in the 'Rules on verification of existence, legal status, operational and financial capacity' document (http://cordis.europa.eu/fp7/find-doc_en.html).
Go to LFV Simulation

Figure 13: LFV simulation tab

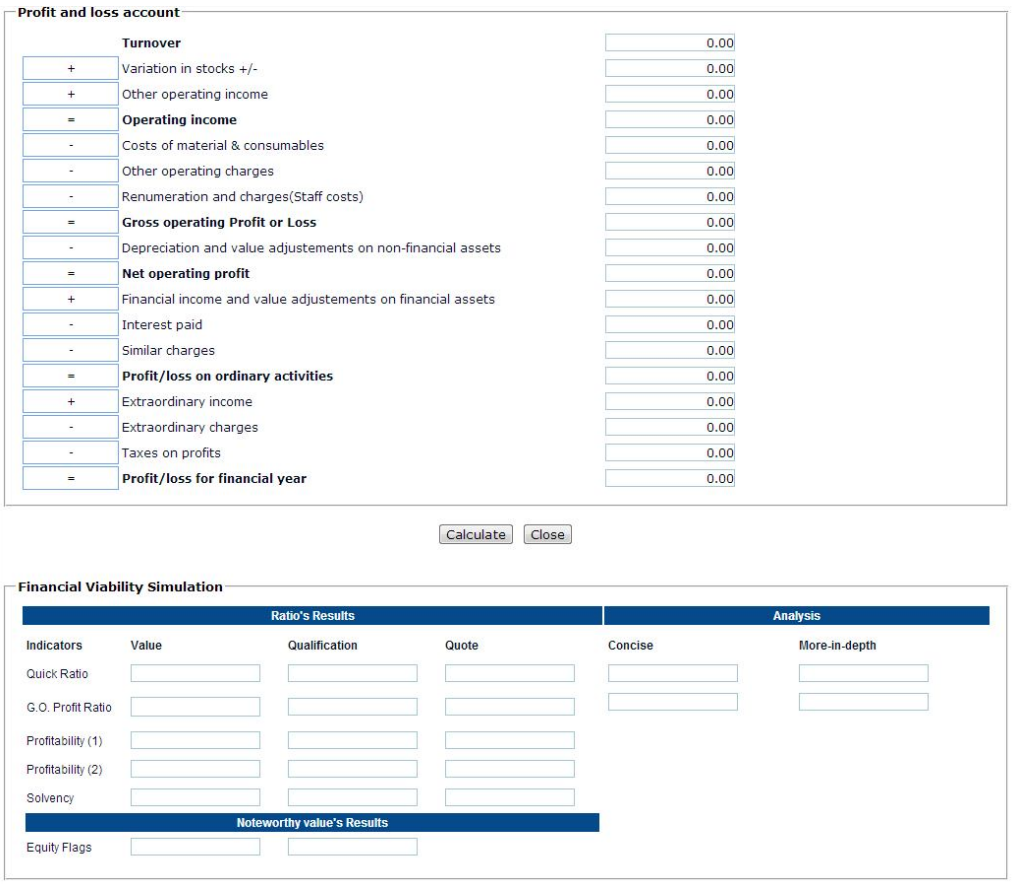


Figure 14: LFV Simulation tool

2.5 Register an organisation

In the past, participants had to provide the Commission with their organisation legal and financial information every time they submitted a proposal or negotiated a contract. This is simplified in FP7.

Participants can register their organisations data ONCE. This will generate a **P**articipant **I**dentification **C**ode (PIC), which defines their organisation's details and status, to be used in the process of electronic proposal submission and negotiation.

Registering an organisation will allow you to receive its Participant Identification Code (PIC). Using a PIC for your organisation has several advantages which are fully explained in *this FAQ entry*.

Use the search facility to check if an organisation has already a PIC.
If you do not find a PIC for your organisation you have to first register as an ECAS user.

With your ECAS password you can register your organisation as **Self Registrant**.

Log on to the Participant Portal, under **"My Organisations"** tab click on the **"Register"** sub-tab (see Figure 15: Register steps).

Follow the steps described below:

.

STEP 1. Search

Use the search facility to check whether your organisation is already registered or in the process of being registered (see section 2.4).

STEP 2. Self-Register your organisation in PP

Register your organisation using your ECAS account details.
After providing all the necessary details, press the **[CONFIRM]** button to submit your registration information to the I Validation Servicess (VS).
If you wish to suspend the registration process at any point, the data entered may be saved as a draft by clicking the **[Save Draft]** button. You may then resume your registration at any time.

STEP 3. Modify your Self Registration

STEP 3a

If you saved your data as draft it is still possible to modify or delete your self-registration.

or

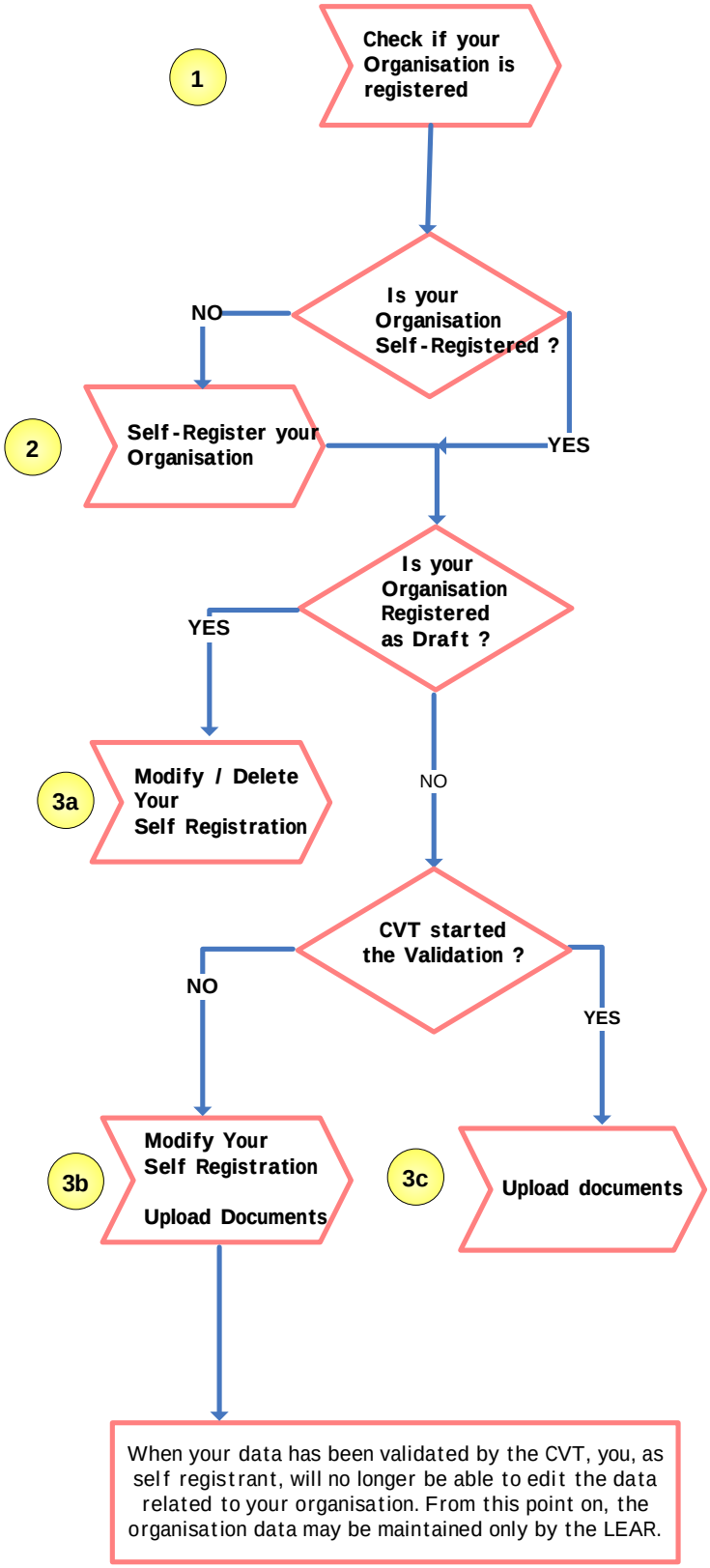
STEP 3b

If you have already submitted your registration and if VS has not started the verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR), it is still possible to modify your self-registration and/or upload additional documents.

or

STEP 3c

If VS has already started the verification process, you can no longer modify your self-registration data but you are still able to upload additional documents


1
Check if your Organisation is registered
Is your Organisation Self-Registered ?
NO
YES
2
Self-Register your Organisation
Is your Organisation Registered as Draft ?
YES
NO
3a
Modify / Delete Your Self Registration
CVT started the Validation ?
NO
YES
3b
Modify Your Self Registration
Upload Documents
3c
Upload documents
When your data has been validated by the CVT, you, as self registrant, will no longer be able to edit the data related to your organisation. From this point on, the organisation data may be maintained only by the LEAR.

.

After identification, the VS begins a verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR). During this period, the data that you have declared about your

organisation can no longer be modified. You will however still be able to upload up to 10 Mb of additional supporting documents.
Once uploaded, these documents cannot be withdrawn or modified, except by the validated LEAR.
When your data has been validated by the VS, you, as self-registrant, will no longer be able to edit the data related to your organisation. From this point on, the organisation data may be maintained only by the LEAR.
For the self-registration, you are re-directed to URF. (See Figure 16: URF – Self Registration).
You can find more information in the *URF user's manual*.

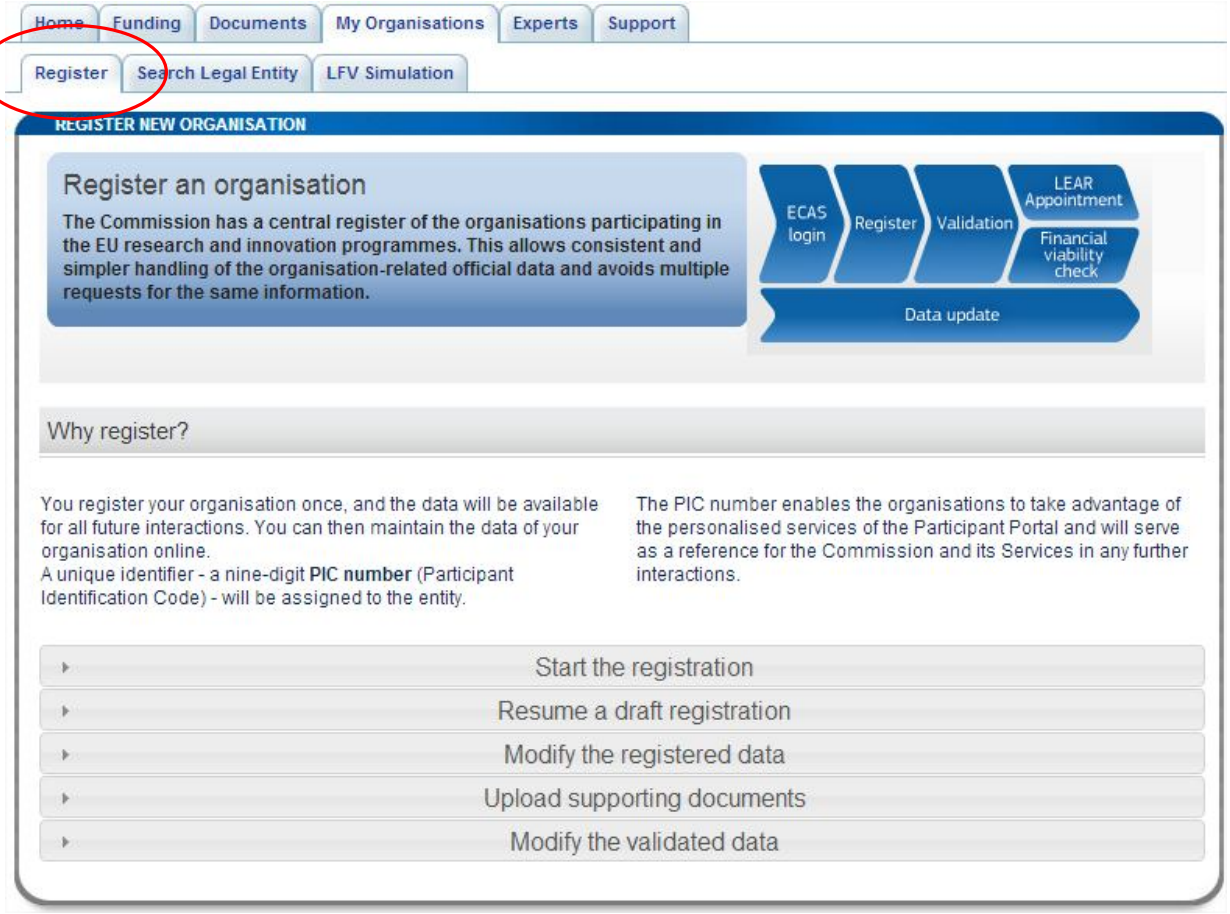

Home
Funding
Documents
My Organisations
Experts
Support
Register
Search Legal Entity
LFV Simulation
REGISTER NEW ORGANISATION
Register an organisation
The Commission has a central register of the organisations participating in the EU research and innovation programmes. This allows consistent and simpler handling of the organisation-related official data and avoids multiple requests for the same information.
ECAS login
Register
Validation
LEAR Appointment
Financial viability check
Data update
Why register?
You register your organisation once, and the data will be available for all future interactions. You can then maintain the data of your organisation online.
A unique identifier - a nine-digit PIC number (Participant Identification Code) - will be assigned to the entity.
The PIC number enables the organisations to take advantage of the personalised services of the Participant Portal and will serve as a reference for the Commission and its Services in any further interactions.
Start the registration
Resume a draft registration
Modify the registered data
Upload supporting documents
Modify the validated data

Figure 15: Register steps

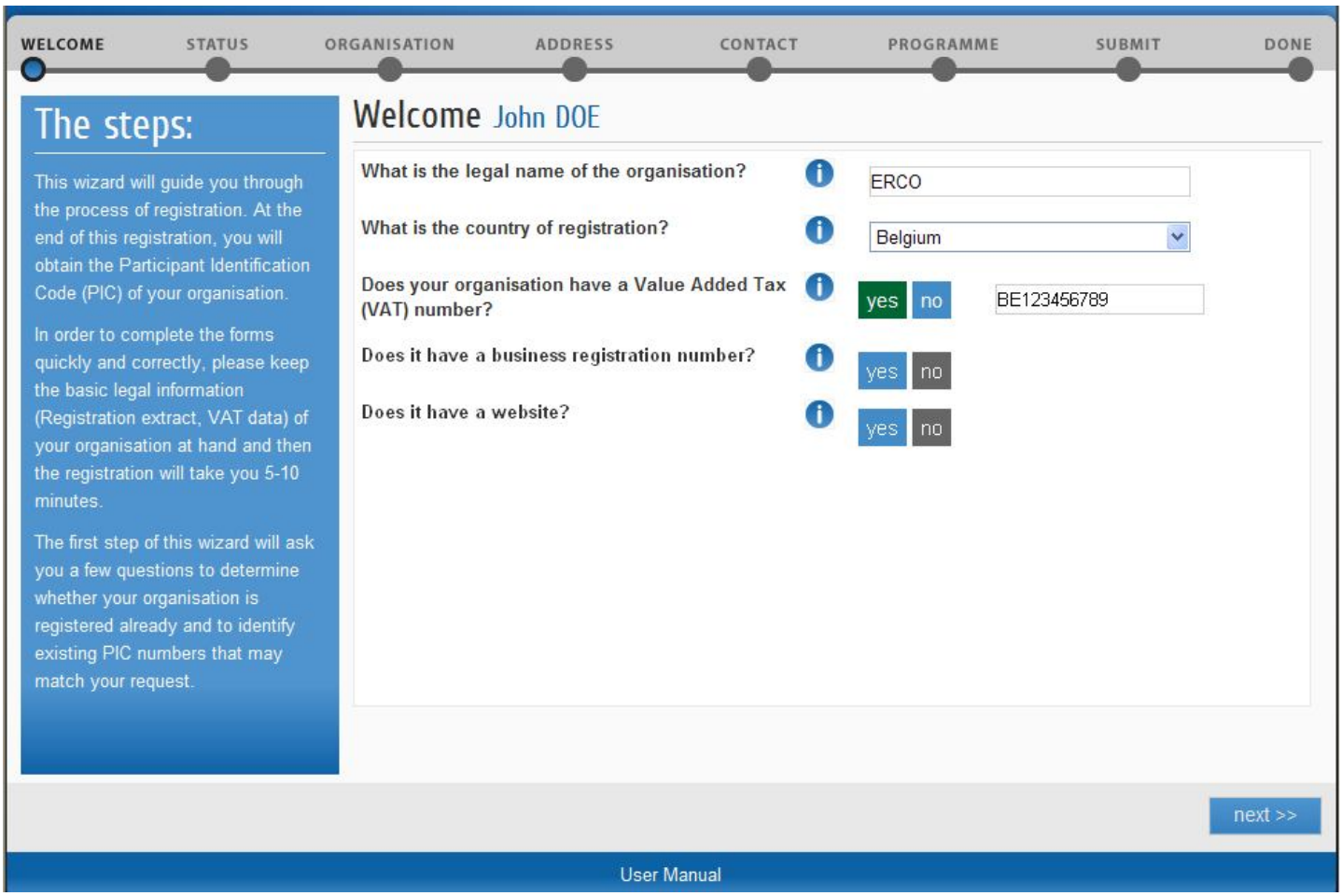

WELCOME
STATUS
ORGANISATION
ADDRESS
CONTACT
PROGRAMME
SUBMIT
DONE
The steps:
This wizard will guide you through the process of registration. At the end of this registration, you will obtain the Participant Identification Code (PIC) of your organisation.
In order to complete the forms quickly and correctly, please keep the basic legal information (Registration extract, VAT data) of your organisation at hand and then the registration will take you 5-10 minutes.
The first step of this wizard will ask you a few questions to determine whether your organisation is registered already and to identify existing PIC numbers that may match your request.
Welcome John DOE
What is the legal name of the organisation?
ERCO
What is the country of registration?
Belgium
Does your organisation have a Value Added Tax (VAT) number?
yes
no
BE123456789
Does it have a business registration number?
yes
no
Does it have a website?
yes
no
next >>
User Manual

Figure 16: URF – Self Registration

2.5.1 Legal Entity Appointed Representatives and account administrators

The Legal Entity Appointed Representative (LEAR) is the person chosen by the organisation to ease the communication with the E.C. and avoid double registrations. Only the LEAR (or account administrator, see the end of the section below) may do a change request of his/her organisation's data and submit legal documents through URF.
LEARs can submit requests for update for

- Legal Data (Name, address, registration number etc)
- FP7 account legal type (SME, Public private, educational etc…) and indirect cost method (ICM)
- Balance sheet data (if requested)

And they can upload supporting documents in URF to back their requests.

More information on the LEAR is available in the FAQ section of the Participant Portal:
http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?_nfpb=true&_pageLabel=faq#LEAR

The documents to appoint a LEAR (LEAR appointment form and role and task definition) are available on
ftp://ftp.cordis.europa.eu/pub/fp7/docs/appointment-lear.pdf
and *ftp://ftp.cordis.europa.eu/pub/fp7/docs/lear-role-tasks.pdf*
Both documents must be signed and stamped, and then sent to the Validation Services (VS) by regular letter.

Note that this guide describes only the access to the URF services. URF does offer a user-friendly environment and its use is very straightforward. Nevertheless, a user manual provides a detailed description of the URF services and how to use them*:*
http://ec.europa.eu/research/participants/portal/ShowDoc/Participant+Portal/portal_content/help/URF_USER_MANUAL.pdf

This is how the Participant Portal supports the LEARs' action.
They can

- **View the information** stored in the account of their legal entity and to **introduce change requests**.
- **Access the list of projects** that their organisations are currently working on.
- **View the roles** of people in their organisation on the projects.

All these services are protected so you must first log on to the Participant Portal.
The process to follow is described under the "Log on the Participant Portal" chapter of this guide.

In order to lighten the LEAR workload (especially in bigger organisations), the participant portal provides the capability to the LEAR to nominate (and subsequently revoke) one or more account administrators.
These persons will have all the rights of the LEAR (except the one of nominating/revoking account administrators themselves) and can therefore perform those tasks on his/her behalf. See section 2.6.4, Roles of an Organisation for more information.

2.6 Manage the organisation data

1. Log on to the Participant Portal
2. Once you are connected to the secured environment of the Participant Portal, select the **"My Organisations"** tab, and then click on **"Organisations"**. You can also click on the "Manage Organisation Data" icon in the home page displayed after login.
3. This tab is divided in 2 parts (see Figure 17: My Organisations):
   - A list of organisations where you are LEAR, Account Administrator, Financial Signatory or Self Registrant
   - A list of organisations where you are involved in a project.

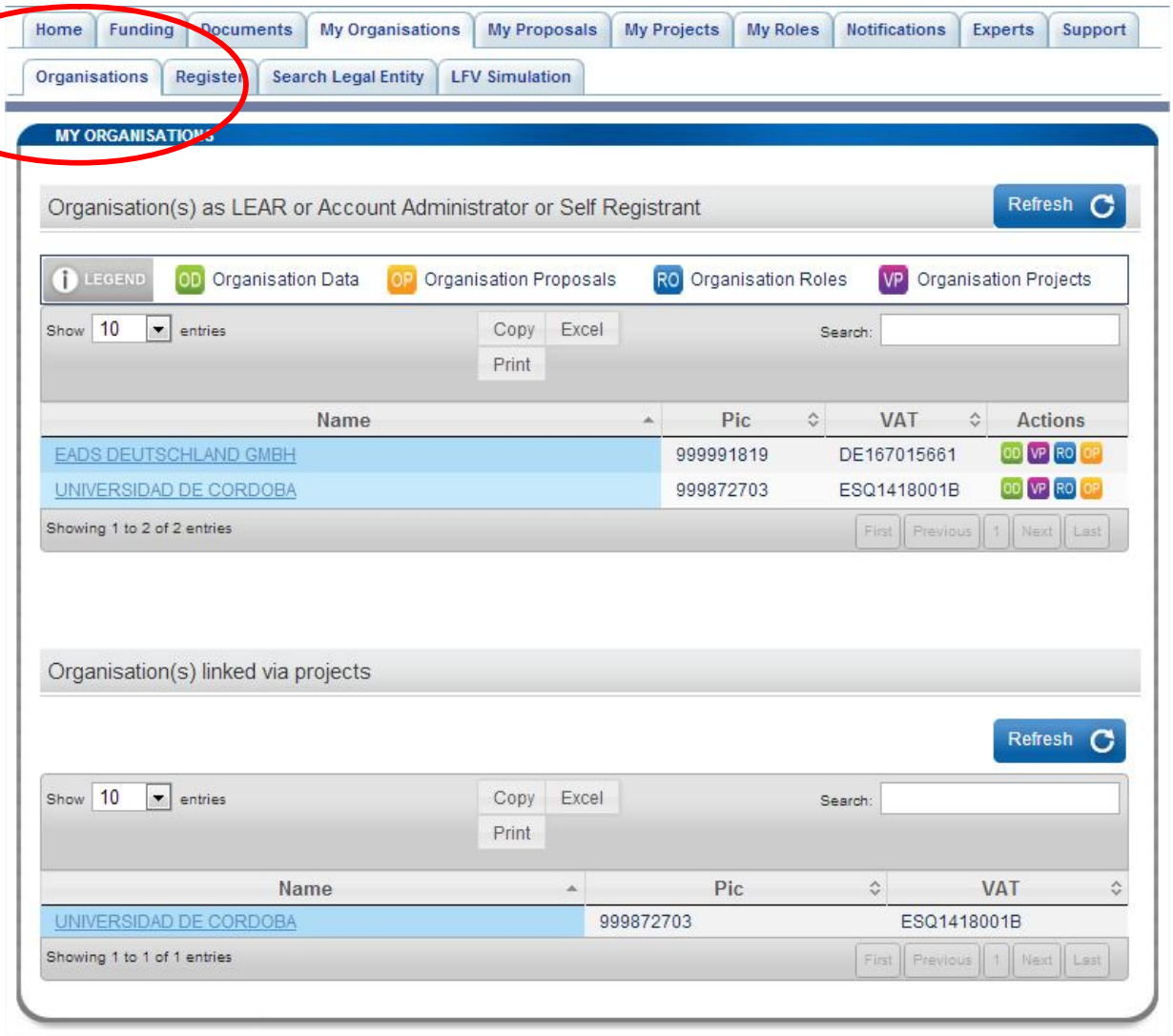


Figure 17: My Organisations

4. If you are a LEAR, Account Administrator or Self-Registrant of the organisation, under the Actions column three buttons are present at the right of the screen: *Organisation Details*/ *View Projects*

/ *Roles*. By clicking one of these buttons you can open a new *portlet*[4] below the **"Organisations"** sub-tab.
If you are Financial Signatory, you can only view the Organisation Details.
If you are Self-Registrant, selecting the *Organisation Details* button will display the URF screen corresponding to that organisation (see Figure 18 - Organisation details for Self-Registrant).

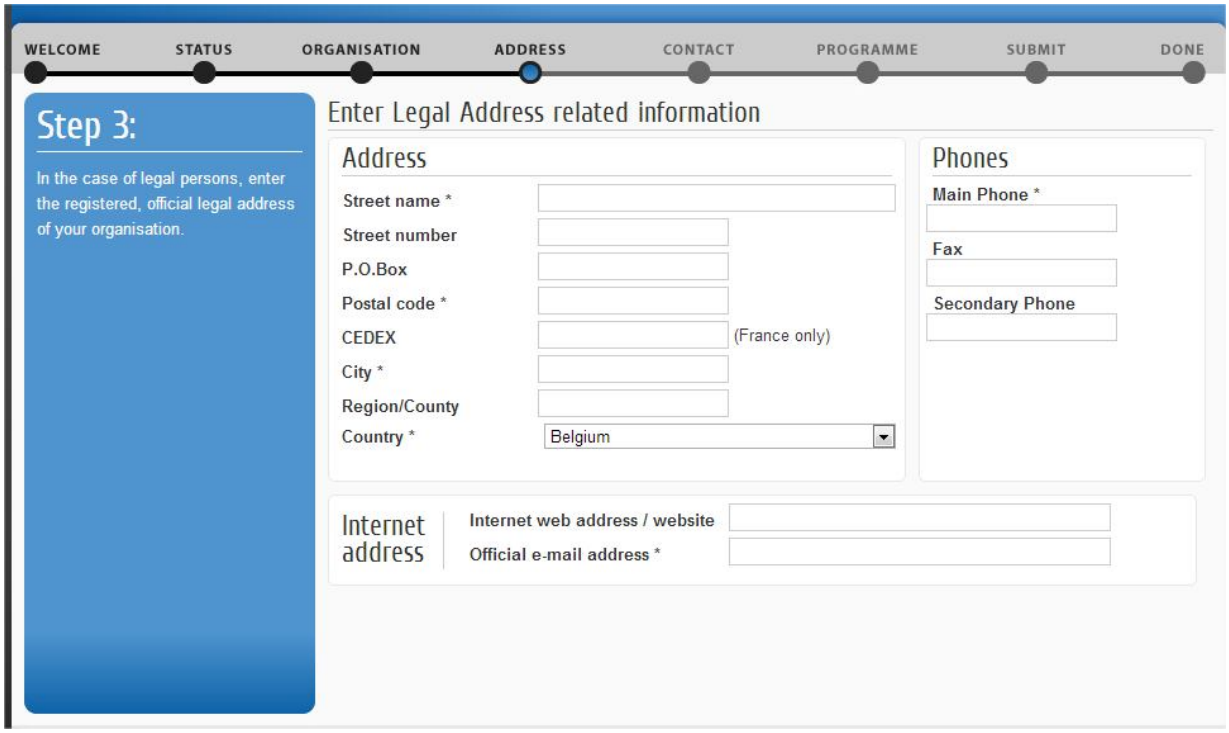


Figure 18 - Organisation details for Self-Registrant

5. If you are not a LEAR or Account Administrator but only linked to an organisation as a project member, you will only be able to see the *Roles* button.

Note : no hyperlink is present in the organisation name where you are self registrant for the other role the organisation details applet is displayed when you click on the organisation name.

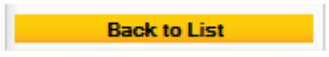
2.6.1 The organisation menu and organisation summary portlets

Whenever specific orgaanisation information is displayed in the main area of the portal, two portlets are shown on the left side of the screen: Organisation menu and Organisation summary (see Figure 19: Organisation Menu and Summary).

The "Organisation Summary" will display core essential information about the currently selected project (Organisation PIC, Business Name VAT and NACE code).

The "Organisation menu" allows the following global navigation actions:

- Returning to the Organisation list (by selecting the **[Back to list]** orange button



[4] A web *portlet* is a small, self-contained window within a web portal that displays useful information or offers a relevant service.

- Displaying the Organisation Details
- Displaying/Managing Roles that are bound to this Organisation
- Displaying the Proposals bound to the Organisation

Figure 19: Organisation Menu and Summary

2.6.2 Status of my organisation

By clicking on the OD *Organisation Details* button or on the Organisation Name in the **"My Organisation"** tab (see Figure 17: My Organisations) you can:

2.6.2.1 **Check if your request has been validated or is in validation.**

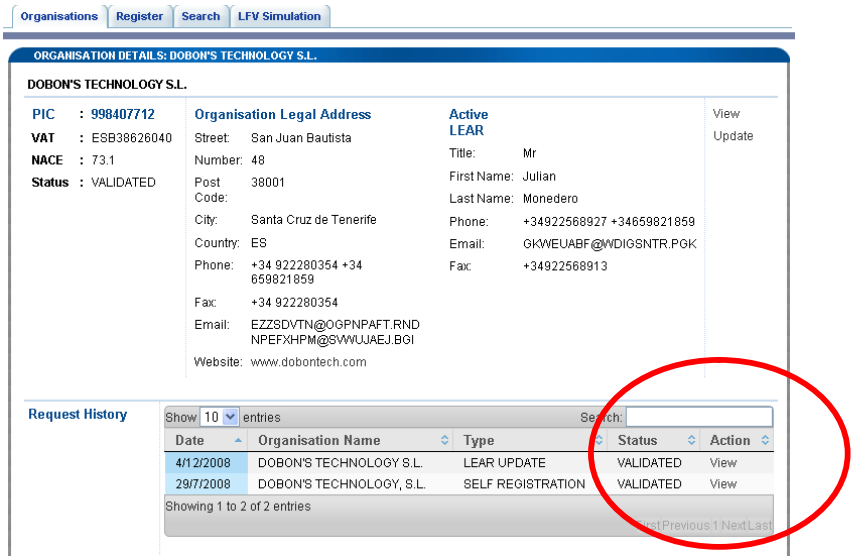


Figure 20: Status of an Organisation

2.6.2.2 View organisation or change (within request history)

You get redirected to URF. No extra authentication will be requested. In URF you will be able to view or modify your organisation data, or verify the status of your registration request (if it has been validated or not). (See Figure 20: Status of an Organisation).

2.6.2.3 Create a change request

If you need to change the data of your organisation through URF, you have to click on the *Update* link. (See Figure 21: Status of an Organisation - Update request).
You are then redirected to URF where you can create an update request of your data.

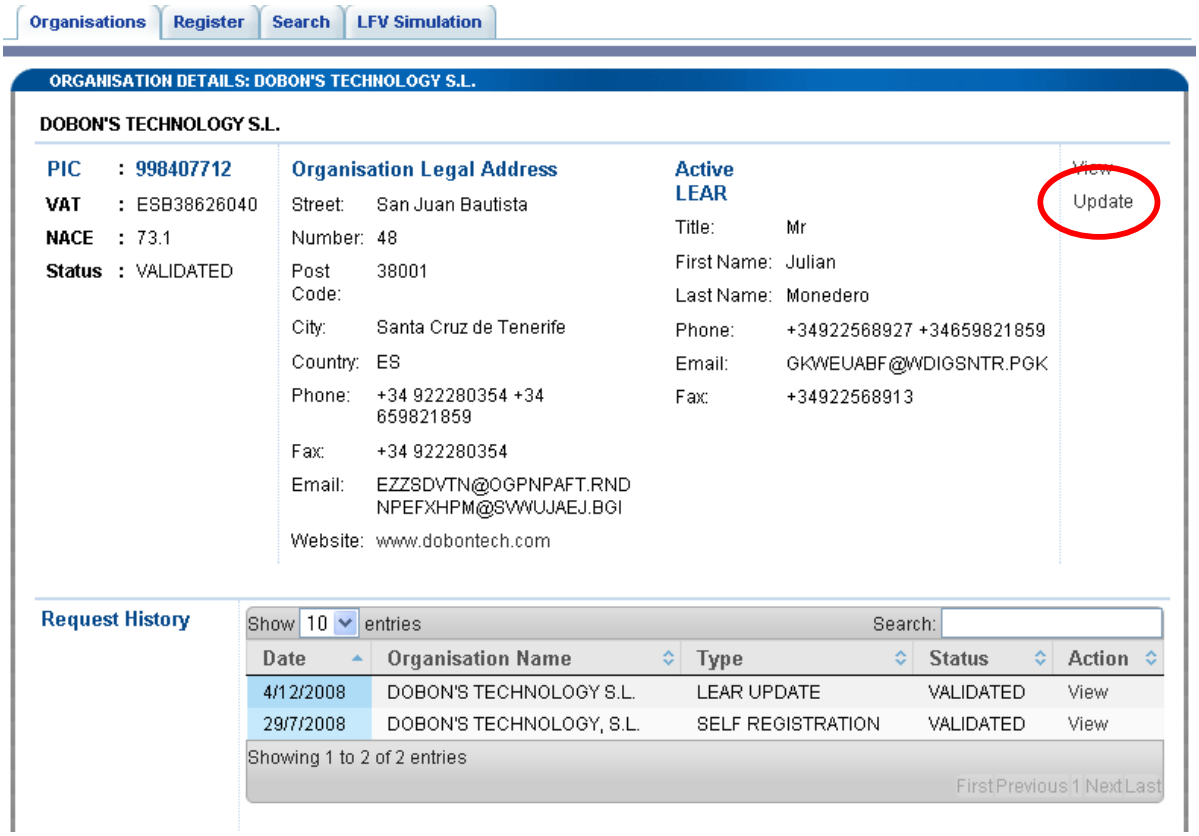


Figure 21: Status of an Organisation - Update request

Please note that when VS is validating your change request, you are no longer able to modify your data. Only the View option is available.
Two types of change request can be managed from this tab:

- "NORMAL" change requests defined as "LEAR UPDATE" under the <Type>column of the "*Request History*" area – **financial info as balance sheet cannot be created/modified.**
- "FINANCIAL" change requests: this change request has to be done "on demand" from NEF. The message below appears:
  You are requested to provide additional financial information in order to complete the negotiation of your grant for proposal #proposal_id#".
  For this new request type, you can only Create/Modify balance sheets and upload documents (mandatory).

You can find more information in the URF user manual, available at:
http://ec.europa.eu/research/participants/portal/ShowDoc/Participant+Portal/portal_content/help/URF_USER_MANUAL.pdf

2.6.2.4 Delete change request

You can delete your change request as long as the VS has not yet started the validation of your request.
The *Delete* link is displayed in the request history part. (See Figure 22: Status of an Organisation - Request not yet validated).
A message asks you to confirm your deletion.

2.6.2.5 Update change request

You can also modify your change request while VS has not yet started the validation of your request.
The *Update* link is displayed in the request history part. (See Figure 22: Status of an Organisation - Request not yet validated).
You are directed to URF and your data can be modified.

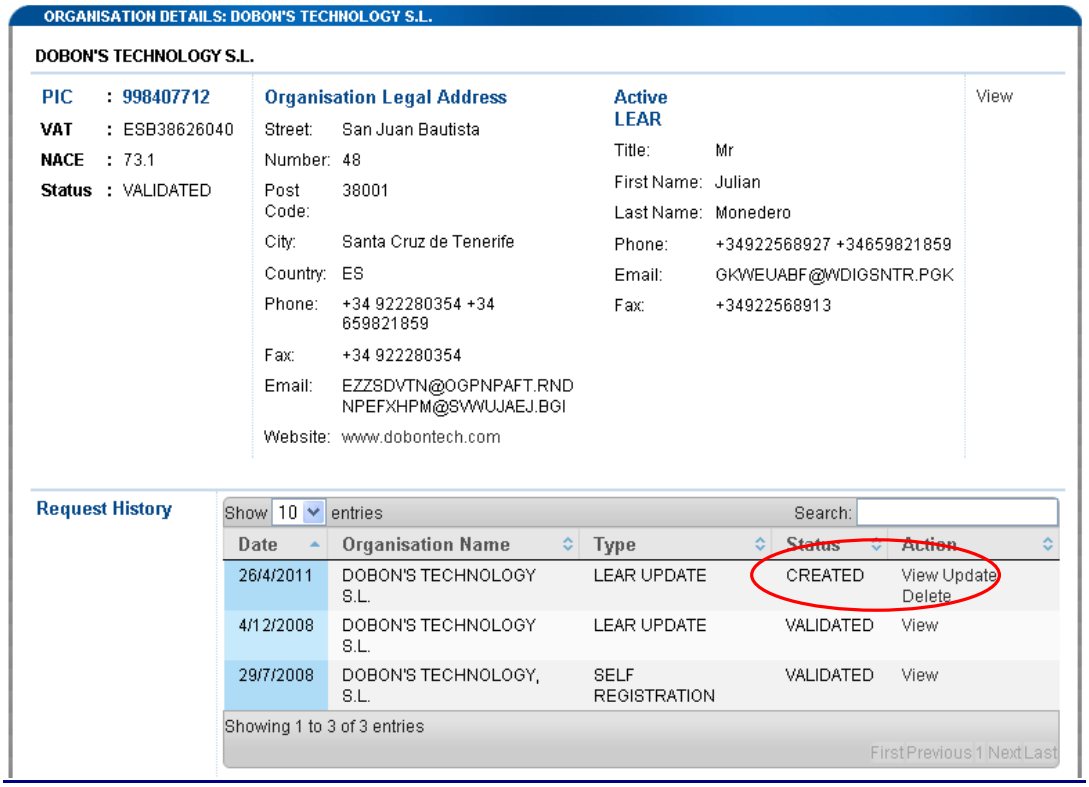


Figure 22: Status of an Organisation - Request not yet validated

2.6.3 View Projects of an Organisation

By clicking on the VP *View Project* button, you can display a view of all the Projects an organisation is involved in, (see Figure 23: Project list of an Organisation).

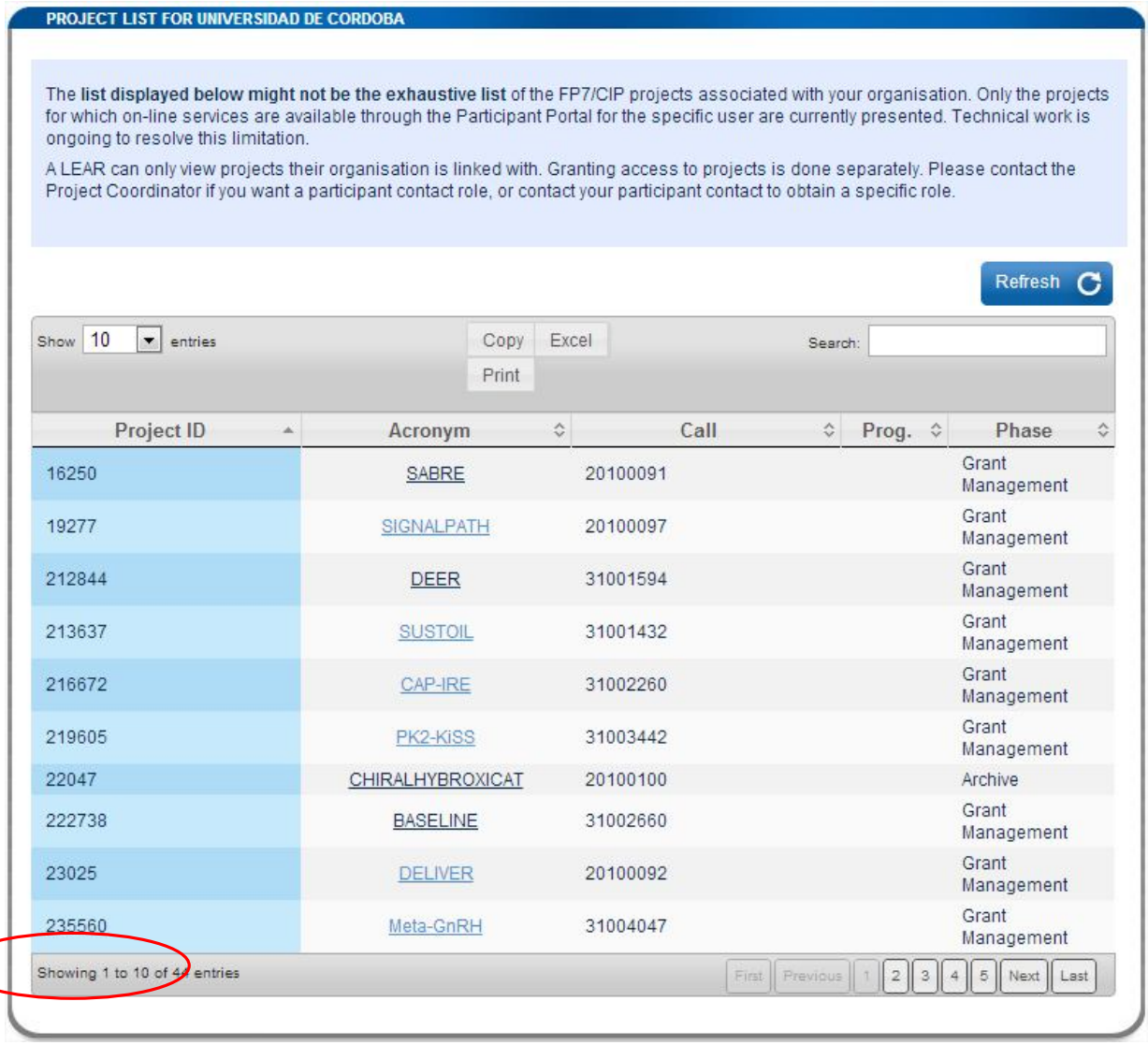

PROJECT LIST FOR UNIVERSIDAD DE CORDOBA
The list displayed below might not be the exhaustive list of the FP7/CIP projects associated with your organisation. Only the projects for which on-line services are available through the Participant Portal for the specific user are currently presented. Technical work is ongoing to resolve this limitation.
A LEAR can only view projects their organisation is linked with. Granting access to projects is done separately. Please contact the Project Coordinator if you want a participant contact role, or contact your participant contact to obtain a specific role.
Refresh
Show 10 entries
Copy
Excel
Print
Search:
Project ID
Acronym
Call
Prog.
Phase
16250 SABRE 20100091 Grant Management
19277 SIGNALPATH 20100097 Grant Management
212844 DEER 31001594 Grant Management
213637 SUSTOIL 31001432 Grant Management
216672 CAP-IRE 31002260 Grant Management
219605 PK2-KiSS 31003442 Grant Management
22047 CHIRALHYBROXICAT 20100100 Archive
222738 BASELINE 31002660 Grant Management
23025 DELIVER 20100092 Grant Management
235560 Meta-GnRH 31004047 Grant Management
Showing 1 to 10 of 44 entries
First
Previous
1
2
3
4
5
Next
Last

Figure 23: Project list of an Organisation

2.6.3.1 **Project details**

Click on the underlined Acronym of a Project (leftmost column) (see Figure 23: Project list of an Organisation) to see the details of this project (see Figure 24: Details of a project).

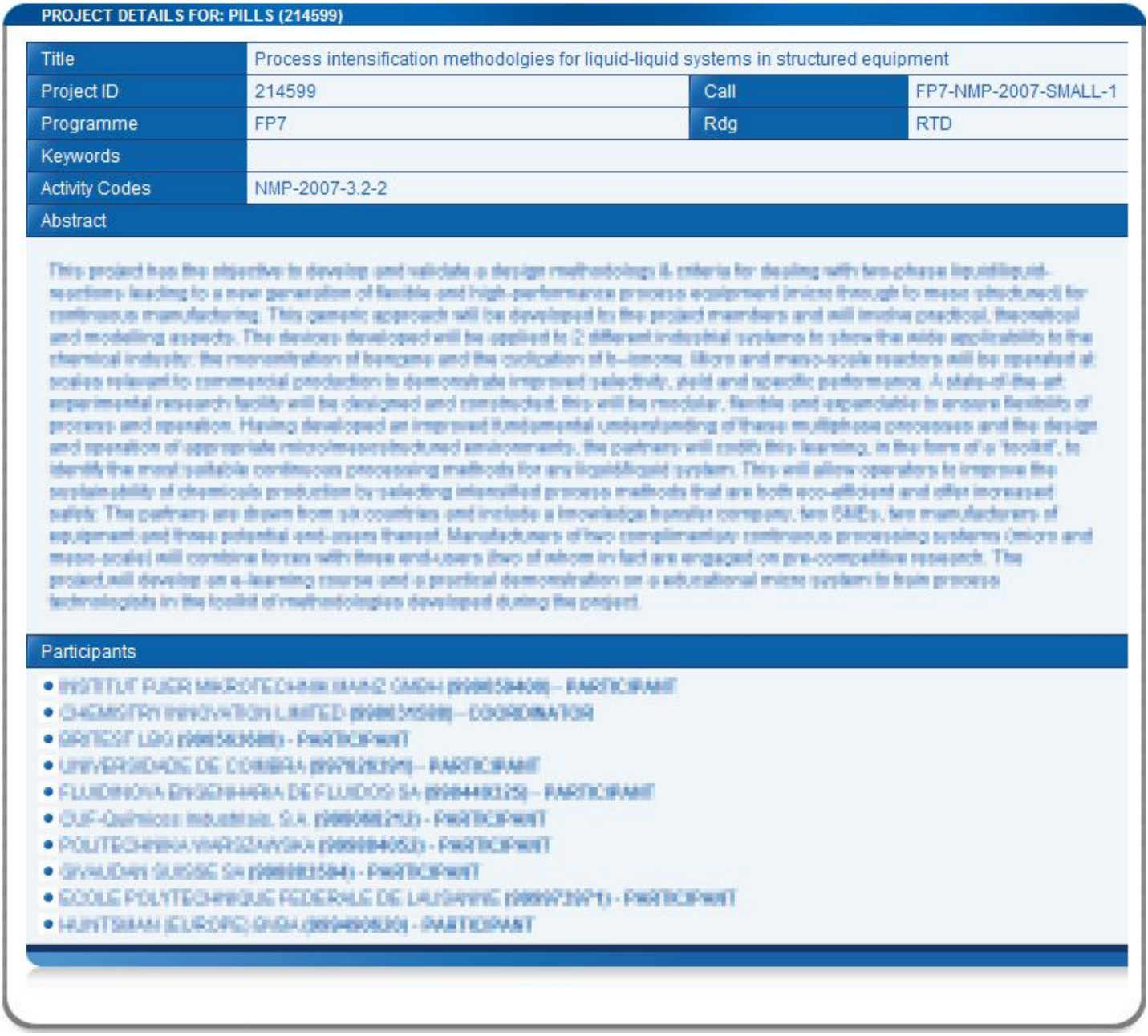


Figure 24: Details of a project

2.6.4 Roles of an Organisation

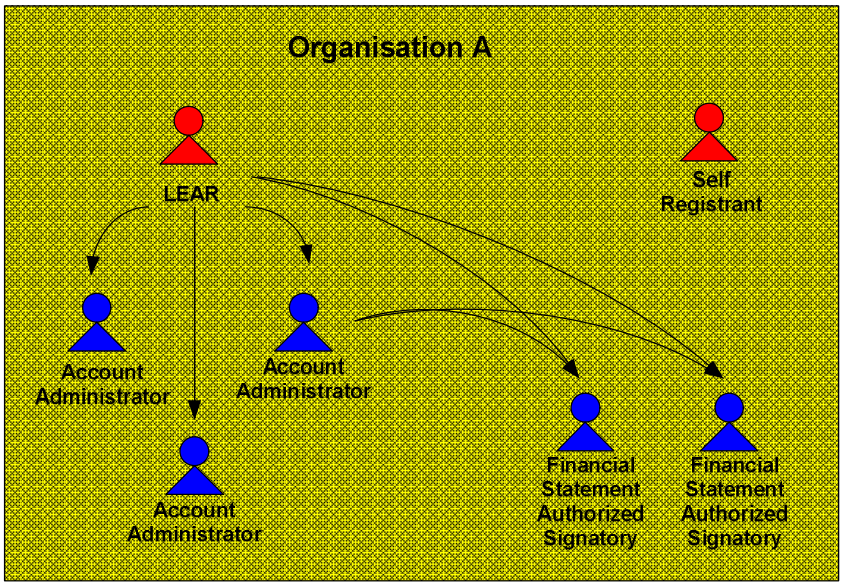


Figure 25: Participant User Account Management

By clicking on the RO *Roles* button, in the **"My Organisation"** tab you can display all the roles of the people in your organisation. (See Figure 26: Roles of the Organisation).

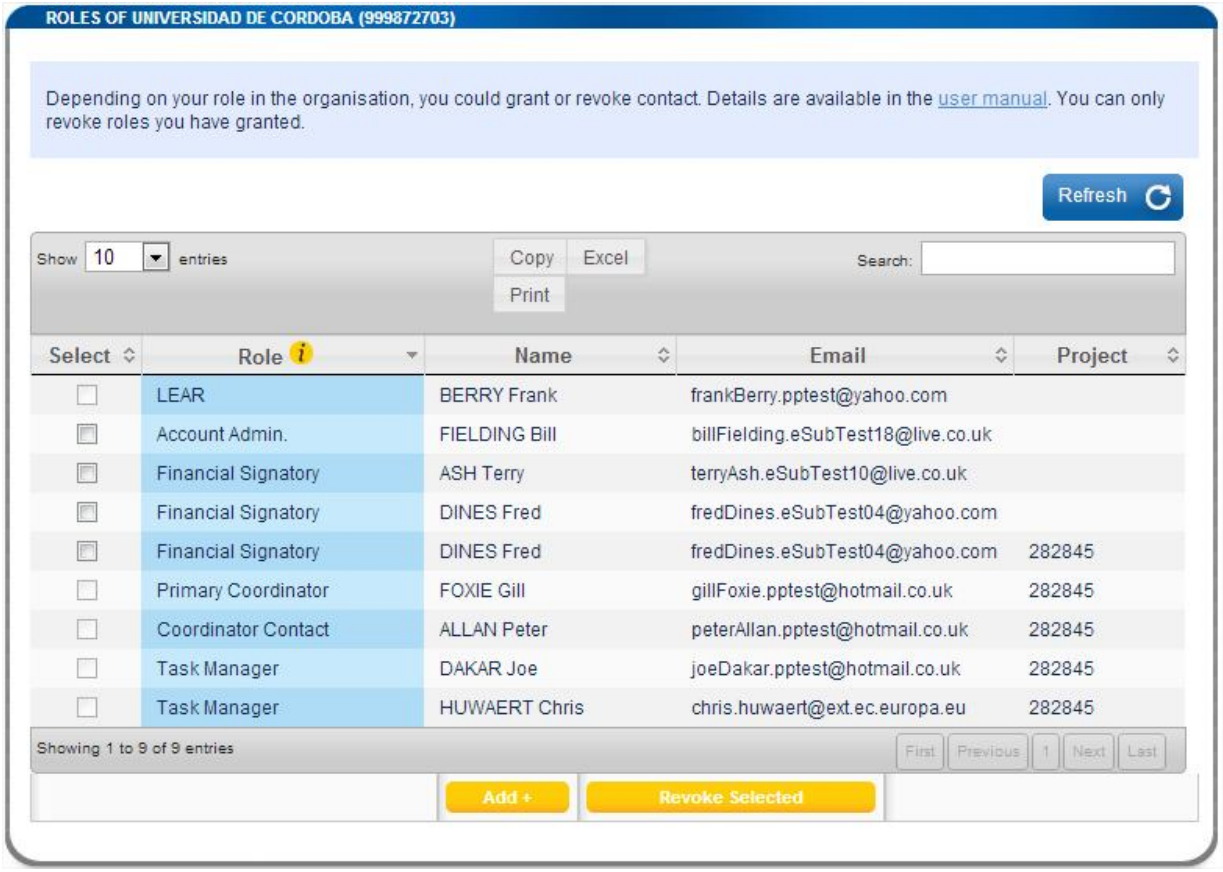


Figure 26: Roles of the Organisation

Depending of your role in the organisation, you could grant or revoke contact. You can only revoke roles you have granted.

As explained in section 2.2, you can use the Search box to filter out any list displayed by the participant portal.

2.6.4.1 Add a role to an organisation

As LEAR, you can add an Account Administrator or Financial Signatory role. Just click on the **[Add+]** button.

When adding Account Administrators:

- Enter the first name, last name and email address of the person that you want to nominate.

When adding Financial Signatories:

- As for Account Administrators, enter the first name, last name and email address of the person that you want to nominate.
- If necessary, add a comment that will help Participant Contacts choose this Financial Signatory to his/her project (whenever a Participant Contact will want to add a Financial Signatory to his project, he will be presented with a list of all the Financial Signatories that have been nominated for his/her PIC. The comment field will allow for a better selection)..

Nominated persons will receive a mail announcing their nomination. If they do not have an ECAS account yet, they will be asked to confirm the creation of a new ECAS account. (See Figure 27 - Add a Financial Signatory role).

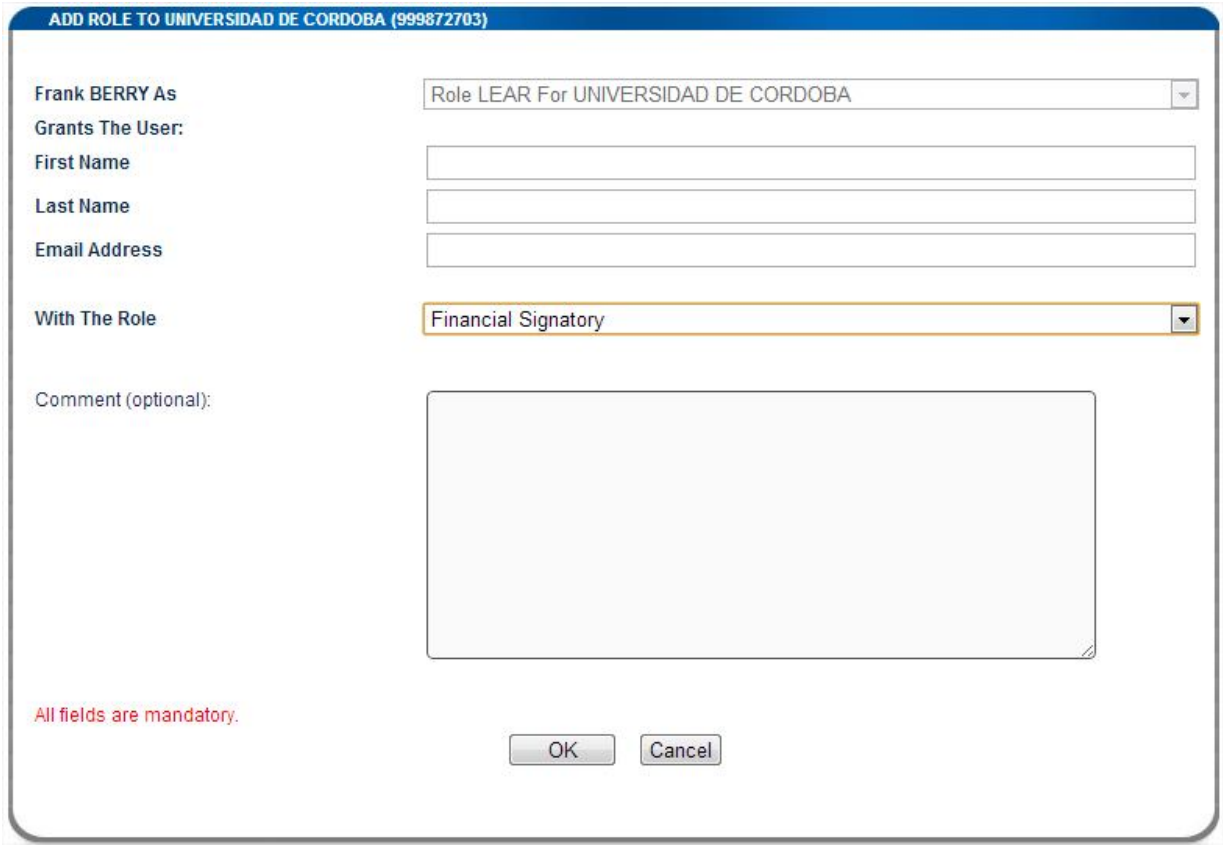


Figure 27 - Add a Financial Signatory role

2.6.4.2 Revoke a role from an organisation

Account Administrators and/or Financial Signatory can also be revoked by the LEAR. Select the check box on the left of the role to be revoked. Click on the **[Revoke Selected]** button and confirm the revocation.

2.6.5 Proposals of an Organisation

If you are a LEAR or Account Administrator of an Organisation, you can view a list of the Proposals in which it is taking part by selecting "Organisation Proposals" from the Organisation Menu (see Figure 19: Organisation Menu and Summary) (remember that you can reach the Organisation Menu by choosing Organisation Details from the My Organisation list).

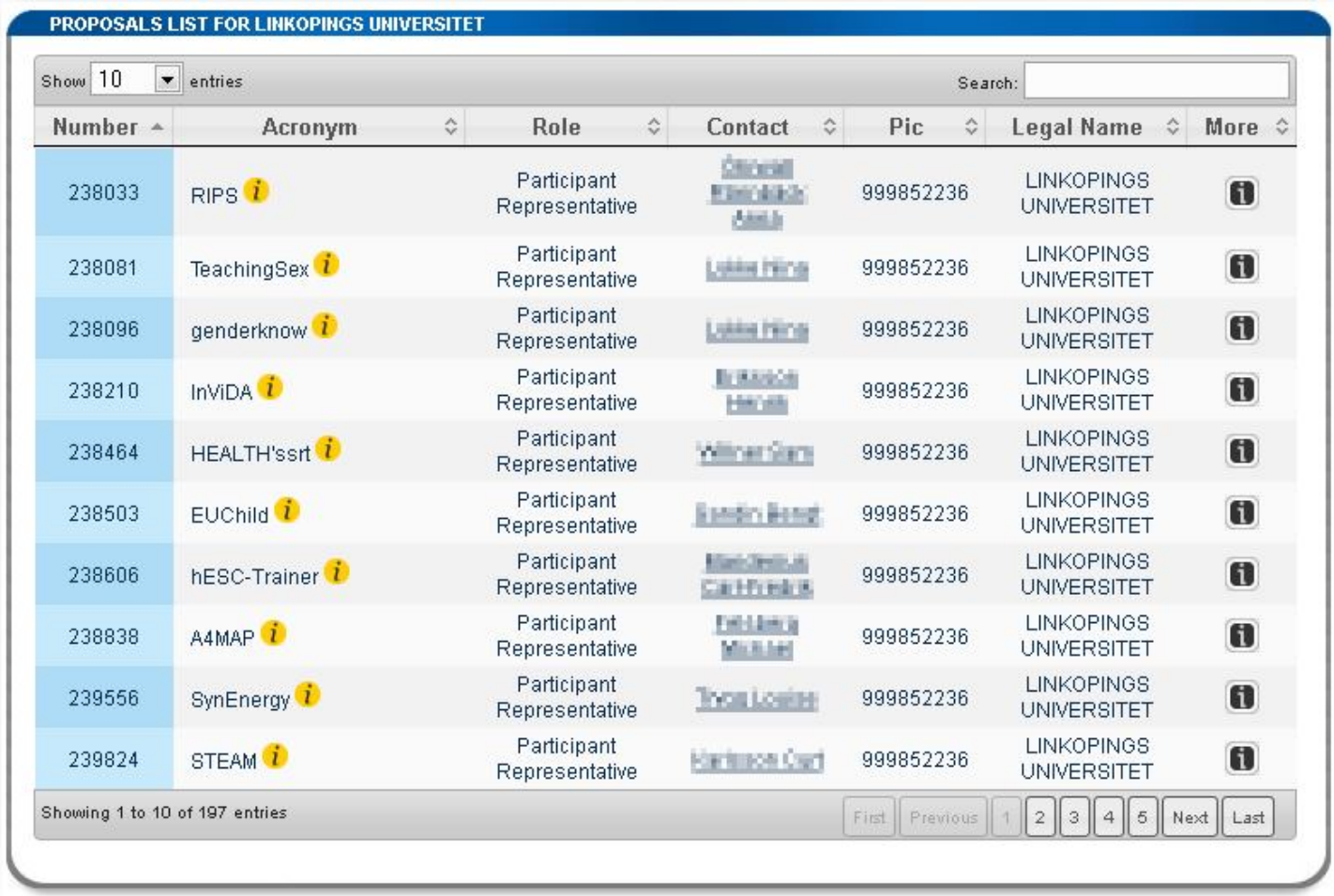

PROPOSALS LIST FOR LINKOPINGS UNIVERSITET
Show 10 entries
Search:
Number
Acronym
Role
Contact
Pic
Legal Name
More
238033 RIPS Participant Representative 999852236 LINKOPINGS UNIVERSITET
238081 TeachingSex Participant Representative 999852236 LINKOPINGS UNIVERSITET
238096 genderknow Participant Representative 999852236 LINKOPINGS UNIVERSITET
238210 InViDA Participant Representative 999852236 LINKOPINGS UNIVERSITET
238464 HEALTH'ssrt Participant Representative 999852236 LINKOPINGS UNIVERSITET
238503 EUChild Participant Representative 999852236 LINKOPINGS UNIVERSITET
238606 hESC-Trainer Participant Representative 999852236 LINKOPINGS UNIVERSITET
238838 A4MAP Participant Representative 999852236 LINKOPINGS UNIVERSITET
239556 SynEnergy Participant Representative 999852236 LINKOPINGS UNIVERSITET
239824 STEAM Participant Representative 999852236 LINKOPINGS UNIVERSITET
Showing 1 to 10 of 197 entries
First Previous 1 2 3 4 5 Next Last

Figure 28 - Organisation Proposal List

The list is composed of:

- The proposal number
- The proposal acronym (if you hover over the yellow information icon , the complete title of the proposal is displayed
- The role of the Organisation within that proposal
- The contact person name (selecting the name will enable to send an email to that person
- The PIC that was used for this Organisation at the time of that proposal submission

- The Legal Name for this Organisation at the time of that proposal submission
- An information icon . If you select it, a small pop-up window containing the Framework Program Call and Funding scheme information of the proposal will appear.

2.7 Manage projects

Note that all the services described below are protected so you must first log on to the Participant Portal. The process to follow is described under the "Log on to the Participant Portal" chapter of this guide.

2.7.1 Access to the list of projects and project details

Coordinators, participants, financial signatories, task managers and team members can access the list of the projects they are involved in:

1. Log on to the Participant Portal
2. Once you are connected to the secured environment of the Participant Portal, select the **"My Projects"** tab
3. You will see a list of all the projects you are involved in.

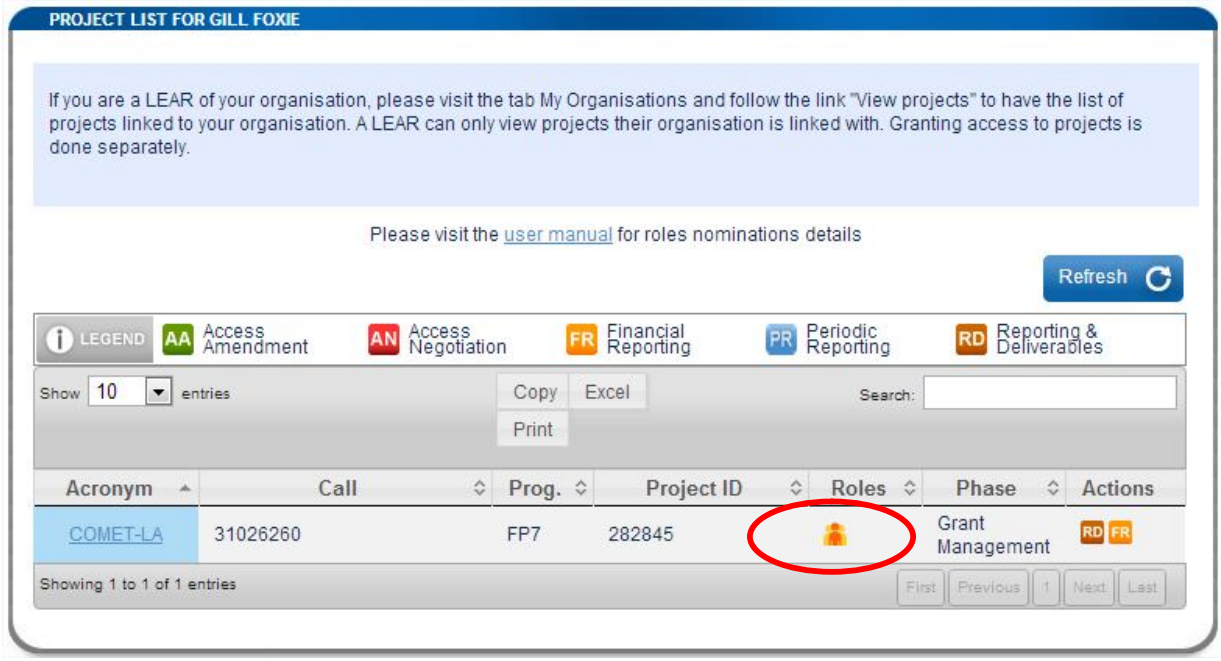


Figure 29: My Projects

4. The interface will display the list (see Figure 29: My Projects), originally sorted by the Project Acronym for which you have a relevant role (for example, participant contact, coordinator contact or Primary Coordinator)
   The following fields will be displayed for each project listed:
   - The <Acronym> of the project. (You can see the full title if you hover over the acronym).
   - The <Call identifier> of the Project
   - The <programme> of the Project
   - The <project ID> (or project number)
   - The <Roles> Icon for Consortium/participant Contacts/Roles
   - The <Phase> of the project (possible values Active or Negotiation)
   - One or more links to the available process of the projects (depending on the current one(s) the links can be:
     - Periodic reporting PR,

- Reporting & Deliverables RD,
- Financial Reporting FR,
- Access Amendment AA ,
- Access Negotiation AN

- For an example of a link to the Negotiation Facility tool (NEF) see § 2.7.4 Access to the negotiations activities (Negotiation Facility tool -NEF)

5. If you have a vast amount of projects, you can filter them using the Search box (as explained in section 2.2).

By selecting the underlined acronym from the list (see Figure 29: My Projects), the same Project Details portlet than the one described in section 2.6.3.1 (Project details, see above), will replace the project list. It contains a more complete set of information about the project that was selected. You can go back to the project list by using the project menu portlet described in section 2.7.2 below.

2.7.2 The project menu and project summary portlets

Whenever specific project information is displayed in the main area of the portal, two portlets are shown on the left side of the screen: project menu and project summary (see Figure 30: Project Menu and Summary).

The "Project Summary" will display core essential information about the currently selected project (Acronym, ID, Call, Programme and Activity codes).

The "Project menu" allows the following global navigation actions:

- Returning to the project list (by selecting the "Back to list" orange button

- Displaying the Project Details
- Managing the Project Roles and/or Consortium (if you are a Primary Coordinator) of the project

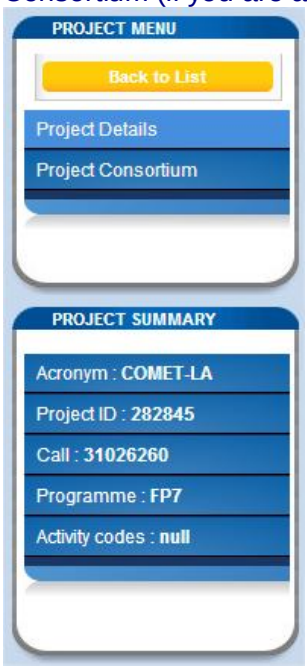


Figure 30: Project Menu and Summary

2.7.3 Roles of a Project

The figure below shows the roles and dependencies inside a project.

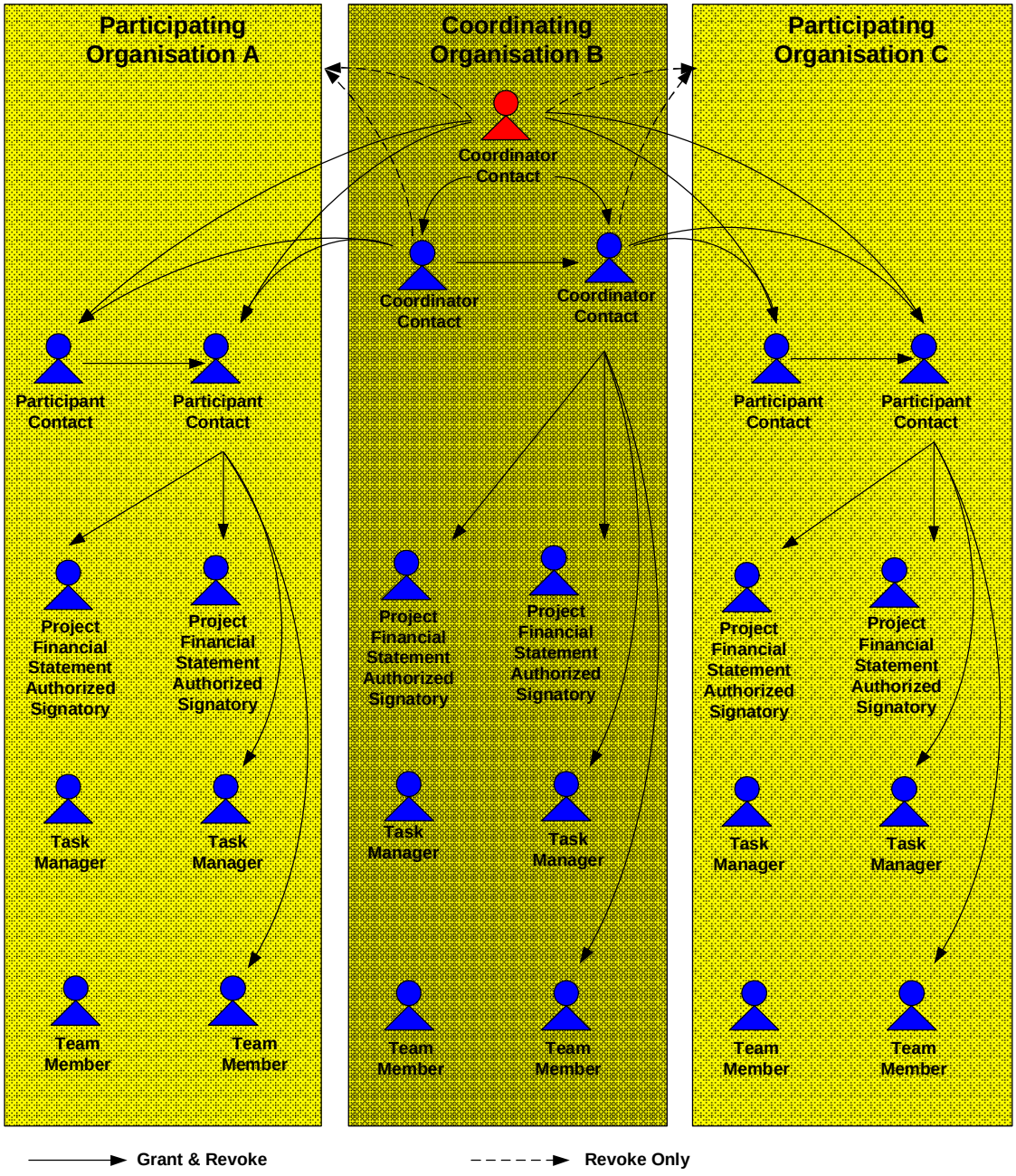


Figure 31: Business and portal roles in a project

2.7.3.1 First level: Primary Coordinator Contact

At the top of the pyramid, there is the Primary Coordinator Contact, who is the main contact person for the Commission at the coordinating beneficiary.
Nomination of only one person per project is possible in this role. By default, this role is provisioned with the respective name and contact details given in the proposal (under A2. 'Contact point').
The Primary Coordinator Contact has the right to grant and revoke the roles of the Participant Contacts in any organisation that is taking part in the Consortium.
In addition, he/she has, for the coordinating beneficiary (i.e. his/her own Organisation, the same rights as the Participant Contacts (see second level below).
During negotiation, the Coordinator Contact and the negotiating Project Officer have to make sure that the contact details are set properly in NEF and match one of the contact person's details given in GPF A 2.4. of the coordinating beneficiary.
Specific responsibility of the Coordinator Contact:

- Assure that the assignments of Participant Contacts are up to date and reflect the reality (including removal of obsolete access rights).
- Inform the Commission on time when the Coordinator Contact has to be changed.

2.7.3.2 Second level: Participants Contacts (including Coordinator Contacts)

At the second level of the pyramid, there are the Participant Contacts, who are the main contact persons for the Primary Coordinator at the participating beneficiaries. Nomination of only five persons per beneficiary and project is possible in this role (note that the Primary Coordinator Contact count in this total for the Coordinator beneficiary).
Participant Contacts who belong to the same Organisation as the Primary Coordinator Contact are called Coordinator Contacts. Like the Primary Coordinator Contact, Coordinator Contacts have the right to grant and revoke the roles of the Participant Contacts in any organisation that is taking part in the Consortium.
By default, these roles are provisioned with the respective names and contact details given in the proposal.
A Participant Contact can nominate other Participant Contacts within his/her own Organisation.
(without approval by the Commission).
The Participant Contacts have also the right to grant and revoke Task Manager and Team Members (3rd level) within their organisation.
Specific responsibility of the Participant Contact:

- Assure that the assignments of third level roles within the own organisation are up to date and reflect the reality (including removal of obsolete access rights).
- Inform the Primary Coordinator Contact when the Participant Contact has to be changed.

2.7.3.3 Third level: Financial Signatories, Task Managers and Team Members

At the third level of the pyramid, there are the Financial Signatories , Task Managers and Team Members.
The Financial Signatories are originally granted by the LEAR or the Account Administrators at organisation level and are available for being assigned to projects by the participant/coordinator contacts.

Team Members have minimal read-only rights to project resource information.

Task Managers extend the Team Member role with the capacity to perform submit, update and delete actions on artefacts of the project they are assigned to.

At the third level, several persons can be nominated in the same role, and the same person can be nominated in several roles.

2.7.3.4 Other roles:

The portal also supports two other roles that you might see in the project roles list:

- The EC Project Officer (person who is dealing with the project at the European Commission)

- The Reviewer (person representing a project reviewer, i.e. who is in charge of reviewing the project).
- The Rapporteur (person representing a project reviewer that is responsible of creation and submission of the consolidated review report. This notion only concerns FP7 projects.).

2.7.3.5 Display Roles

When you click on the role ( ) icon that is on the line of a project (see Figure 32: The project list roles icon), the consortium of this project is displayed.
This screen gives you an overview of all the Participants taking part in the Project (i.e. the Consortium) and, for each Participant, a list of their Contacts (see Figure 33 - Consortium and roles of a project), along with the project menu and project summary (see section 2.7.2 for a description of the project menu and project summary).

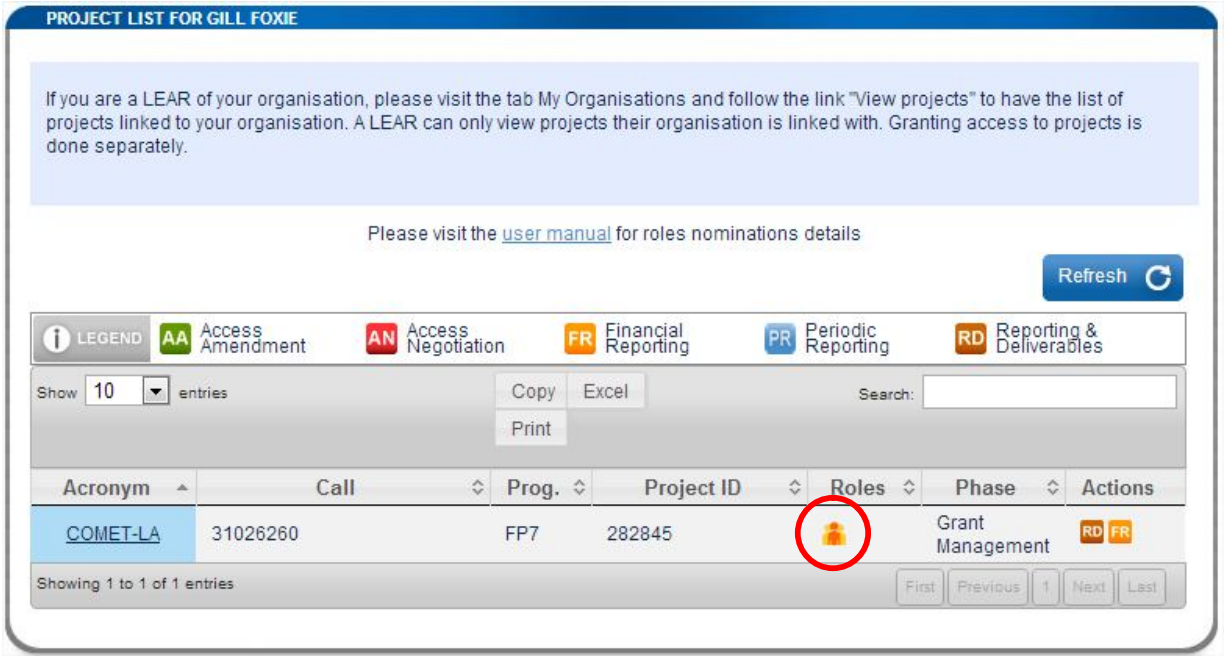


Figure 32: The project list roles icon

Figure 33 - Consortium and roles of a project

2.7.3.6 Add a new role in your project

When you click on the [**+**] button (Figure 33 - Consortium and roles of a project), you have to enter the email address, first name and last name of the user you grant in the "Add role" area (Figure 34: Add role). This user will receive a notification (see section 2.9 Manage notifications) announcing him his nomination. If not already done, he will be asked to register in ECAS.
Then, depending on your own role, you have to choose the role given (see Figure 31: Business and portal roles in a project for more information about the nominations you can make depending on your own role).

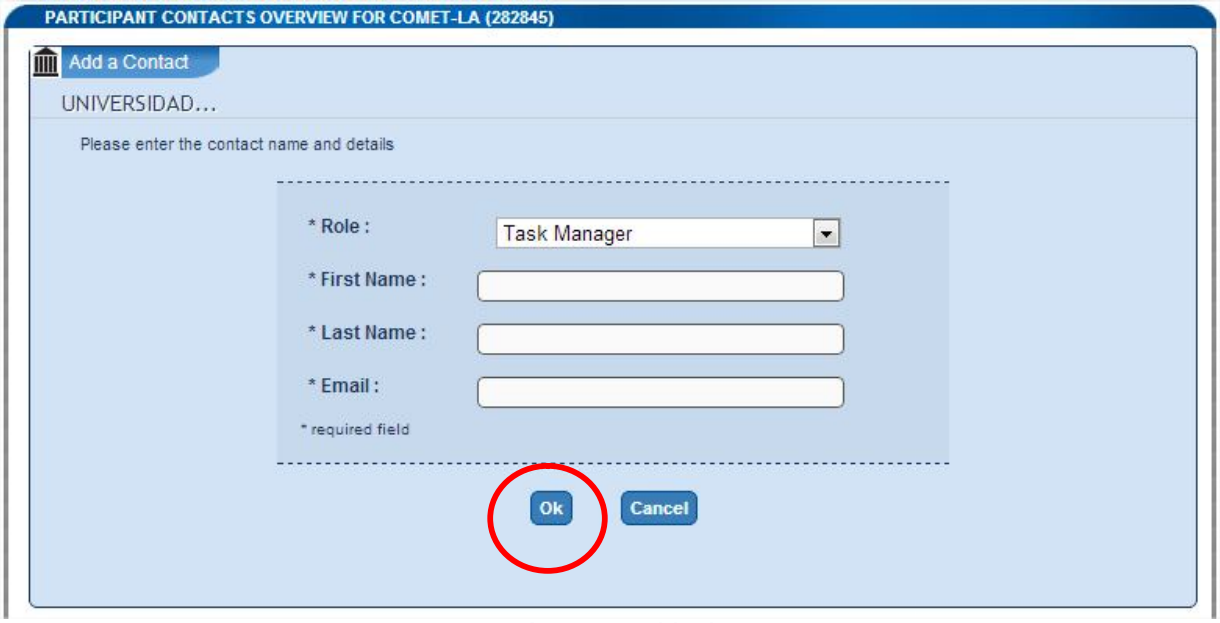


Figure 34: Add role

In the above example, a Participant Contact is adding a Task Manager.

2.7.3.7 Revoke a role from your project

Depending on your role, you can also revoke some roles (see Figure 35: Confirmation of the revocation). Select the [X] icon to the right of the role to be revoked. Click on the **[Revoke Selected]** button and confirm the revocation.

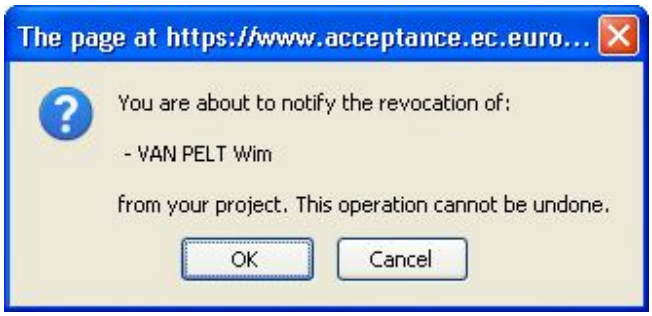

The page at https://www.acceptance.ec.euro...
You are about to notify the revocation of:
- VAN PELT Wim
from your project. This operation cannot be undone.
OK
Cancel

Figure 35: Confirmation of the revocation

2.7.3.8 Manage the Consortium (or Manage Participants)

If you are Primary Coordinator or Participant contact (including Coordinator contact[6]) the same screen allows you to manage all the Participant Contacts bound to the project.
If you are a Participant Contact, you will be able to modify Participant Contacts for your Organisation only.
If you are Primary Coordinator, you will be able to modify Participant Contacts for any Organisation making up the Consortium.

To add a contact, you must select the little "plus" button at the top of the list ( ) next to the participant you want to add the contact to (see below).

Figure 36 - Managing the Participant Contact details

Note that there is a limitation of 5 Contacts per Participant. If you reach that number the little + button will not be visible.
By selecting "+", the "Add a contact" screen is displayed (see Figure 37 - Adding a Contact to a Participant).

[6] Quick reminder: a Participant Contact belonging to the Coordinating Organisation is called Coordinator Contact.

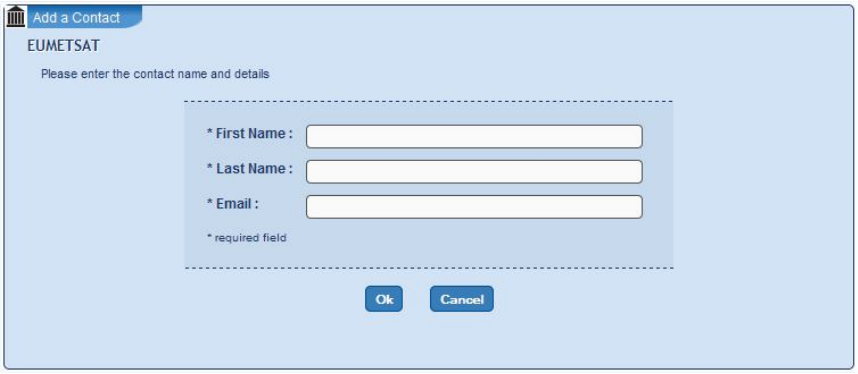


Figure 37 - Adding a Contact to a Participant

If you want to remove a contact from the list, select the X button next to his name. A confirmation screen will be shown (see Figure 38 - Removing a Contact). Select OK to remove the Contact.

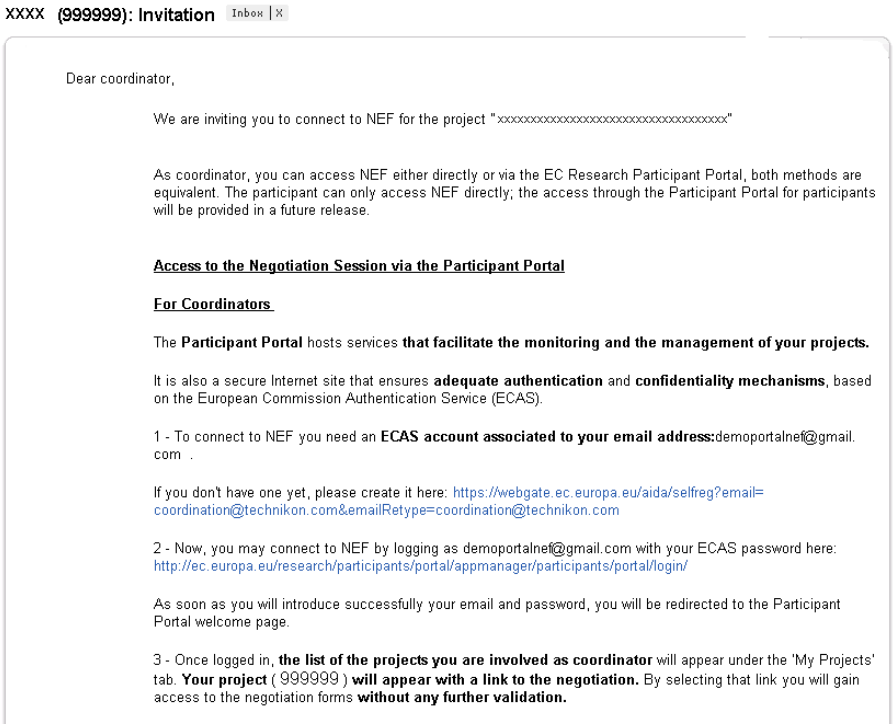
Figure 38 - Removing a Contact

Reminders:

- The Primary Coordinator cannot be removed.
- If you are a Participant Contact you can only add or remove contacts to or from your own Organisation.
- The Primary Coordinator and Coordinator contacts can add or remove contacts to or from any Organisation

2.7.4 Access to the negotiations activities (Negotiation Facility tool -NEF)

Your project has been selected for negotiation. Once the negotiations are opened by the Commission, you will receive an e-mail (see Figure 39: Invitation from NEF) inviting you to connect to the Participant Portal in order to access the negotiation sessions supported by NEF (Figure 40: Projects list - Access Negotiation).



XXXX (999999): Invitation Inbox | X

Dear coordinator,

We are inviting you to connect to NEF for the project "xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx"

As coordinator, you can access NEF either directly or via the EC Research Participant Portal, both methods are equivalent. The participant can only access NEF directly; the access through the Participant Portal for participants will be provided in a future release.

Access to the Negotiation Session via the Participant Portal

For Coordinators

The **Participant Portal** hosts services **that facilitate the monitoring and the management of your projects.**

It is also a secure Internet site that ensures **adequate authentication** and **confidentiality mechanisms**, based on the European Commission Authentication Service (ECAS).

1 - To connect to NEF you need an **ECAS account associated to your email address:**demoportalnef@gmail.com .

If you don't have one yet, please create it here: https://webgate.ec.europa.eu/aida/selfreg?email=coordination@technikon.com&emailRetype=coordination@technikon.com

2 - Now, you may connect to NEF by logging as demoportalnef@gmail.com with your ECAS password here: http://ec.europa.eu/research/participants/portal/appmanager/participants/portal/login/

As soon as you will introduce successfully your email and password, you will be redirected to the Participant Portal welcome page.

3 - Once logged in, **the list of the projects you are involved as coordinator** will appear under the 'My Projects' tab. **Your project** (999999) **will appear with a link to the negotiation.** By selecting that link you will gain access to the negotiation forms **without any further validation.**

Figure 39: Invitation from NEF

1. Log on to the Participant Portal
2. Once you are connected to the secured environment of the Participant Portal, select **"My Projects"** tab
3. The list of the projects you are involved will be displayed. On the right side of the screen, the link Access Negotiation AN is displayed only once the negotiations are open by the Commission (see Figure 40: Projects list - Access Negotiation)
4. Note that for some projects, a link to Access Amendment AA is provided. It is displayed only once a grant agreement has been signed and amendments are requested (see Figure 41: My Projects - Links to NEF for amendments).

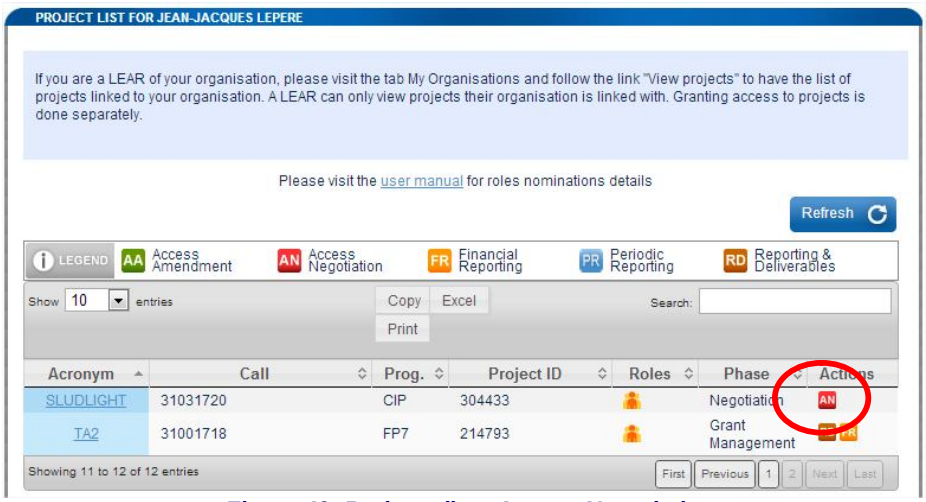


Figure 40: Projects list - Access Negotiation

5. You will be automatically redirected to the project page of NEF, with no further authentication requirements (see Figure 42: NEF). Depending on your role, you will be able to perform different tasks on NEF. In case of multiple partners' projects, the participants can also access NEF in a more limited way – mainly to enter data to be submitted by the coordinator. The validation of the data you might enter in NEF is the sole responsibility of the coordinator of the project.

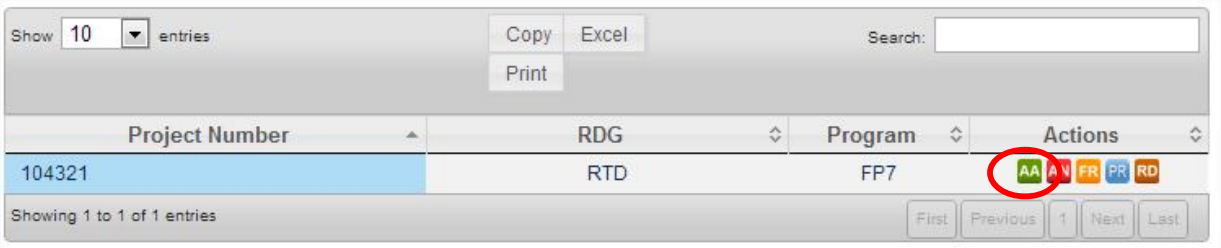


Figure 41: My Projects - Links to NEF for amendments

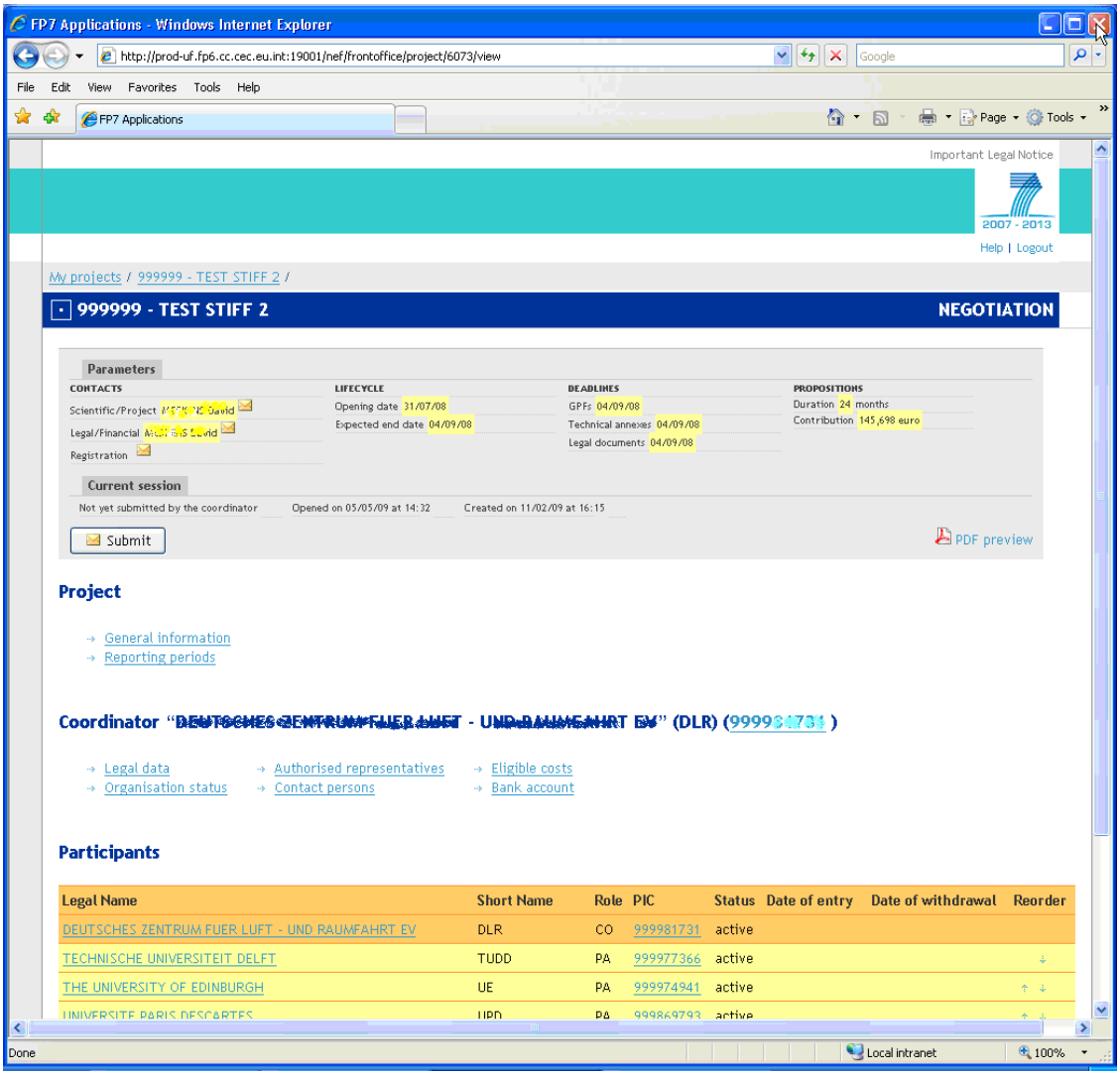


Figure 42: NEF

More information on how to use NEF can be found in the NEF user guide.

Please note that the Participant Portal is the single gateway to NEF for both coordinators and other participants involved in negotiations, replacing the old way of accessing NEF – the access key mechanism.

2.7.5 Access to the reporting activities

In order for a user to have access to the Reporting functionality, s/he must have the role of Participant Contact (incl Coordinators) or task manager.

2.7.5.1 Accessing the reporting functions

1. Log on to the Participant Portal
2. Once you are connected to the secured environment of the Participant Portal, select **"My Projects"** tab
3. The list of the projects you are involved with will be displayed. (See Figure 43: Access to Reporting applications).
4. For any of your project that is in the "Active" phase, you can access both the technical reporting (Reporting & Deliverables RD) as the financial one FR, (Form C). Once you have clicked on the link, you will be redirected to the right supporting application.

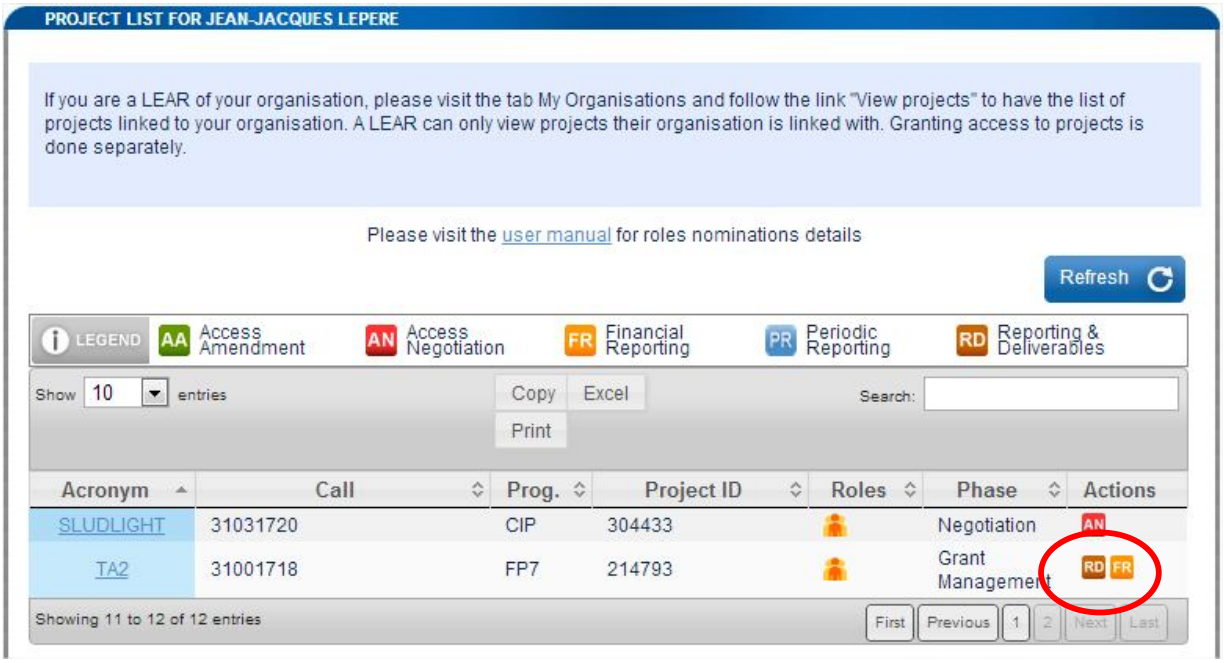


Figure 43: Access to Reporting applications

2.8 Manage roles

Please see sections "2.1 Roles", "2.6.4 Roles of an Organisation" and "2.7.3 Roles of a Project" for a complete description of Role management within the portal.

List of roles and their rights

FULL ROLE NAME	SHORT ROLE NAME	Who can enrol?	Who can revoke/notify revocation
LEAR	LEAR	SYSTEM	SYSTEM
ACCOUNT ADMINISTRATOR	AA	LEAR	LEAR
SELF REGISTRANT	REG	SYSTEM	SYSTEM
PRIMARY COORDINATOR CONTACT	PRIMARY COORDINATOR	SYSTEM	SYSTEM
COORDINATOR CONTACT[7]	COORDINATOR	PRIMARY COORDINATOR, COORDINATOR	PRIMARY COORDINATOR, COORDINATOR
PARTICIPANT CONTACT	PARTICIPANT CONTACT	PARTICIPANT CONTACT (same PIC), PRIMARY COORDINATOR, COORDINATOR	PARTICIPANT CONTACT (same PIC), PRIMARY COORDINATOR, COORDINATOR
FINANCIAL SIGNATORY	FSIGN	LEAR (builds the list of available FSIGN for a PIC) COORDINATOR, PARTICIPANT CONTACT: assign to a Project)/	LEAR[8] (all projects +list) COORDINATOR, PARTICIPANT CONTACT: revoke from a project.
TASK MANAGER	TM	COORDINATOR, PARTICIPANT CONTACT	COORDINATOR, PARTICIPANT CONTACT
TEAM MEMBER	TB	COORDINATOR, PARTICIPANT CONTACT	COORDINATOR, PARTICIPANT CONTACT

Table 2: List of roles and their nomination rights

[7] It is a Participant Contact with the same PIC as the PRIMARY COORDINATOR

[8] If a LEAR revokes an FSIGN from the list of available FSIGNS for a PIC, that FSIGN will be revoked from all the Projects he/she has been assigned to by the Participant Contacts

2.9 Manage notifications

Notifications are messages sent by the different services available on the Participant Portal.
Currently, notifications are sent via email but it is foreseen that other channels will be made available in the future. They are also displayed in the **"Inbox"** sub tab of the **"My Notifications"** tab. (See Figure 44: My Notifications).

Examples of notifications:

- You will receive a notification if you are nominated in a new role.
- A LEAR will receive a notification if someone of his/her organisation is nominated in a new role.
- A notification can be sent to all Portal users in case of an exceptional situation of the Portal or its services.
- Notifications are sent when modifications are done on calls that you have subscribed to (see "**Your Subscribed Calls**" below) and also on calls that fulfil your selected criteria (see "**Subscription Criteria**" below).

2.9.1 Notifications

In the Participant Portal, your notifications are visible from the "**Inbox**" sub tab of the "**My Notifications**" tab. (See Figure 44: My Notifications).

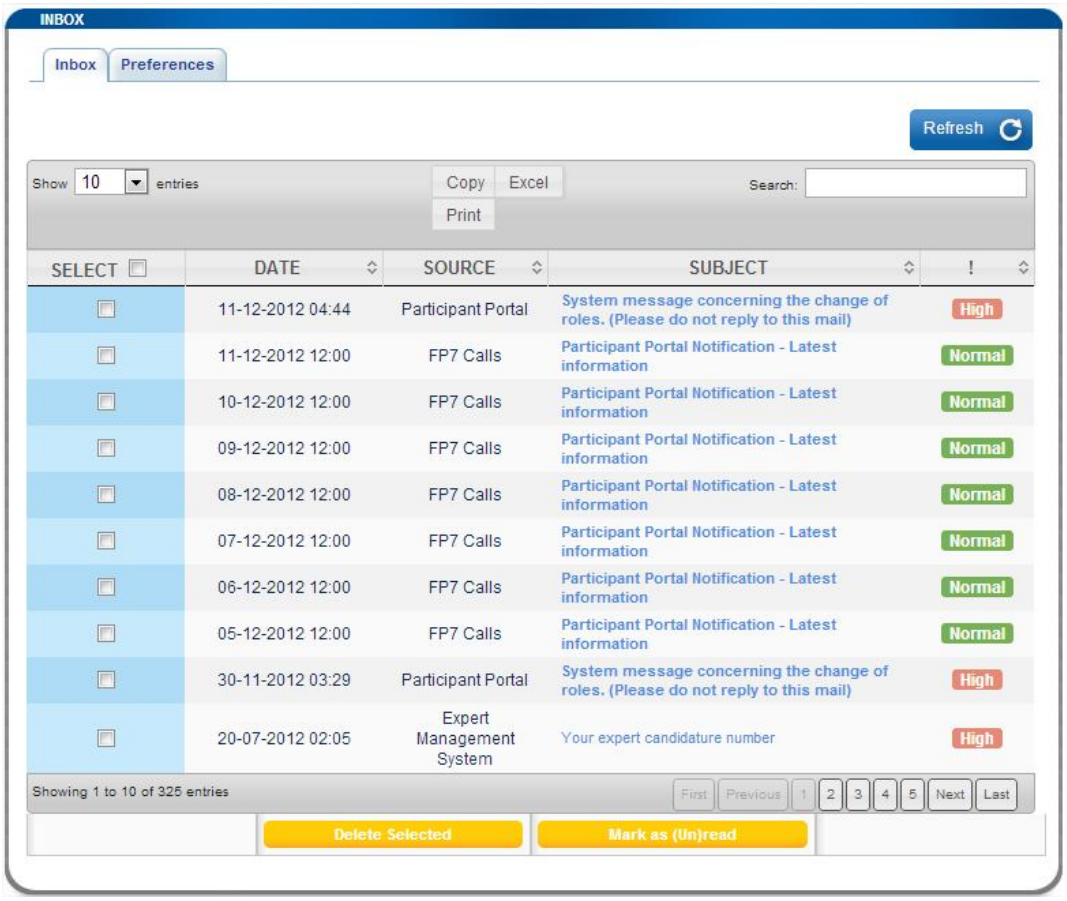


Figure 44: My Notifications

2.9.1.1 Columns in the Inbox tab

- A <SELECT>checkbox allows the participant to delete or mark as (un)read the selected records.
- The <DATE> is the date of the notification when the message was sent.
- The <SOURCE> represents the sender of the notification message. The source of the messages can be:
  - Participant Portal: e.g. when the user has been assigned to a new role;
  - FP7 Calls: e.g. when data of a call you subscribed has changed
  - Notification coming from the Submission and Evaluation of Proposals system.
- If the <SUBJECT> is underlined (hyperlink mode) then the participant can click on it, in order to open the notification and display the message body (see Figure 45: Notification content). If the message body is empty then the subject is not underlined. The font style of the subject is bold when the message is unread and regular once the message is read.

- The <**!**> symbol (as in Outlook) is the importance level of the notification. The levels are LOW- NORMAL – HIGH and VERY HIGH. The records can be filtered by introducing one of the four statuses above in the "Search" text box.

2.9.1.2 Buttons

A refresh button

allows the participant to refresh his notifications. No automatic refresh exists. The button should be used e.g. if after logging in the user adds a new call to the e-mail notifications. The call will be listed under the "My Notifications" "Your Subscribed Calls" tab, after the refresh button has been used or after the user logs in again.

The **[Delete Selected]** button allows the participant to delete the selected notifications.

The **[Mark as (un)Read]** button changes the status of all the selected notifications. If all the selected notifications are read then the button displays [Mark as Unread] else it displays **[Mark as Read]**

The **[Select All]** button allows the participant to select all the notifications currently displayed.

2.9.1.3 Notification content

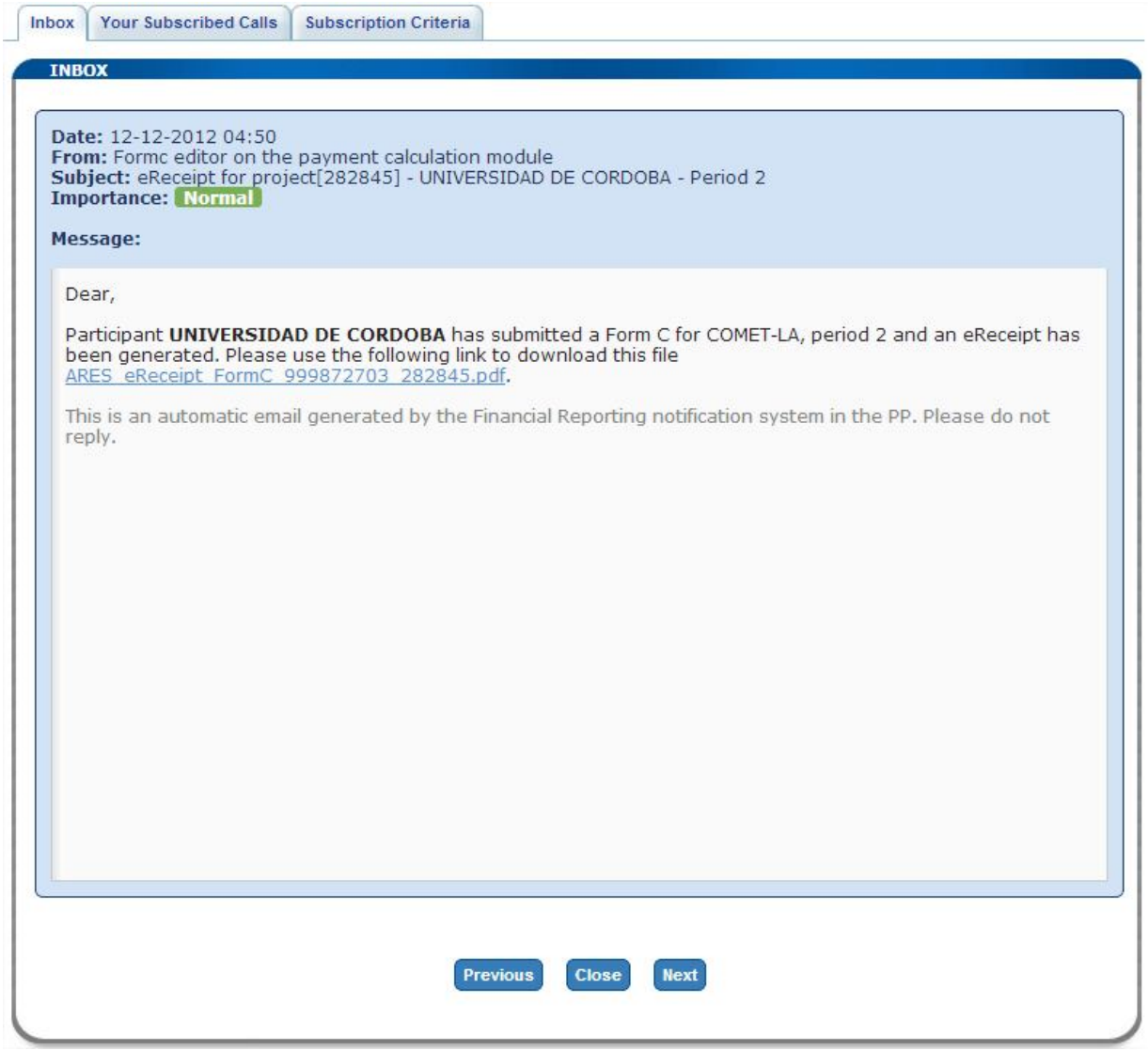

Inbox
Your Subscribed Calls
Subscription Criteria
INBOX
Date: 12-12-2012 04:50
From: Formc editor on the payment calculation module
Subject: eReceipt for project[282845] - UNIVERSIDAD DE CORDOBA - Period 2
Importance: Normal
Message:
Dear,
Participant UNIVERSIDAD DE CORDOBA has submitted a Form C for COMET-LA, period 2 and an eReceipt has been generated. Please use the following link to download this file
ARES_eReceipt_FormC_999872703_282845.pdf.
This is an automatic email generated by the Financial Reporting notification system in the PP. Please do not reply.
Previous
Close
Next

Figure 45: Notification content

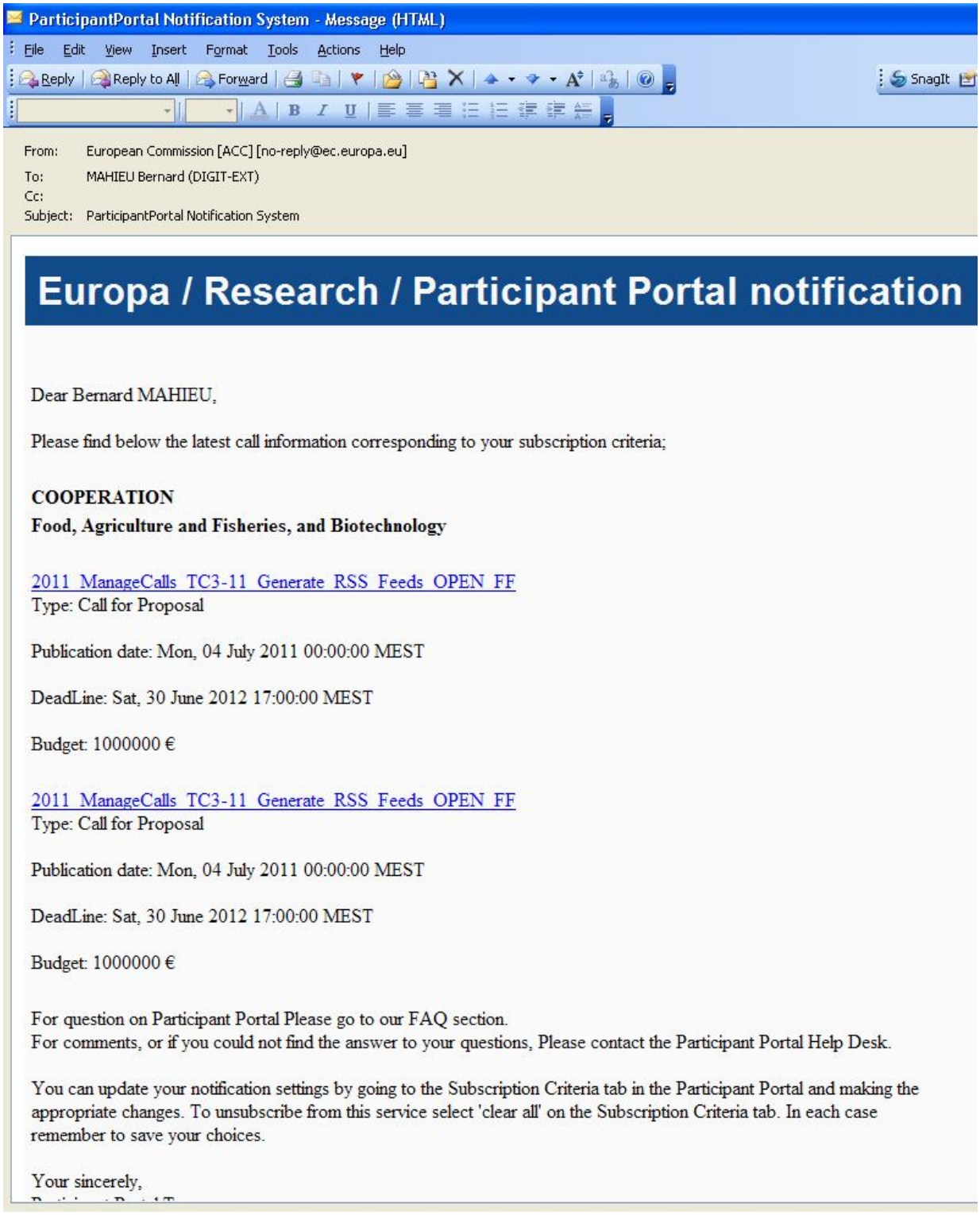
The notification is displayed in the page above when the participant clicks on an underlined subject. It contains

1. The date when the message was sent
2. The sender (see above)
3. The subject
4. The importance level in text mode
5. The message body with vertical and horizontal scroll bars displayed when the message body is too long or too large.

The **[Close]** button closes the notification content and returns to the notification list.

The **[Previous]** and **[Next]** buttons allow browsing through the set of notifications of the "My Notifications" tab.

2.9.1.4 Example of an e-mail notification



ParticipantPortal Notification System - Message (HTML)

File Edit View Insert Format Tools Actions Help

Reply | Reply to All | Forward | SnagIt

From: European Commission [ACC] [no-reply@ec.europa.eu]
To: MAHIEU Bernard (DIGIT-EXT)
Cc:
Subject: ParticipantPortal Notification System

Europa / Research / Participant Portal notification

Dear Bernard MAHIEU,

Please find below the latest call information corresponding to your subscription criteria;

COOPERATION
Food, Agriculture and Fisheries, and Biotechnology

2011_ManageCalls_TC3-11_Generate_RSS_Feeds_OPEN_FF
Type: Call for Proposal

Publication date: Mon, 04 July 2011 00:00:00 MEST

DeadLine: Sat, 30 June 2012 17:00:00 MEST

Budget: 1000000 €

2011_ManageCalls_TC3-11_Generate_RSS_Feeds_OPEN_FF
Type: Call for Proposal

Publication date: Mon, 04 July 2011 00:00:00 MEST

DeadLine: Sat, 30 June 2012 17:00:00 MEST

Budget: 1000000 €

For question on Participant Portal Please go to our FAQ section.
For comments, or if you could not find the answer to your questions, Please contact the Participant Portal Help Desk.

You can update your notification settings by going to the Subscription Criteria tab in the Participant Portal and making the appropriate changes. To unsubscribe from this service select 'clear all' on the Subscription Criteria tab. In each case remember to save your choices.

Your sincerely,

Figure 46: Notification e-mail

2.9.1.5 Notification and event

The following table gives an overview of the messages currently sent through the notification service:

NOTIFICATION	LEVEL	EVENT	RECIPIENT(S)
Organisation Role Nomination	High	A new Account Administrator has been nominated by the LEAR of an organisation. Automatically generated message.	• All the Account Administrators of the organisation[9]. • The newly nominated user.
Project Role Nomination	High	The Primary Coordinator Contact of a Project has nominated a user as a Participant Contact (see section 2.7.3.8, Manage the Consortium) or a new nomination is done at project level (e.g. a Participant Contact nominates a Team Member; see section 2.7.3.6, Add a new role in your project). Automatically generated message.	• The LEAR of the Organisation for which the Contact has been nominated. • All the Account Administrators of the Organisation of the newly nominated user. • The newly nominated user.
Call	Normal	When a call has been published or when any call-related information (e.g. the "Latest information on call") is modified. Criteria to be defined by the user.	• Any user that subscribed to call(s) or defined subscription criteria

Table 3: Current Notification details

2.9.1.6 Preferences

As a user, you can decide the minimum level of Notification you want to receive (knowing that the "Very High" level cannot be ignored) as well as the frequency of reception per level (as soon as they occur, daily or weekly).

You can change this through the "Preferences" link available from the "**Inbox**" sub tab of the "**My Notifications**" tab. (See Figure 47: Notifications – Preferences).

[9] It is the LEAR who is the originator of the nomination, therefore he/she is not notified.

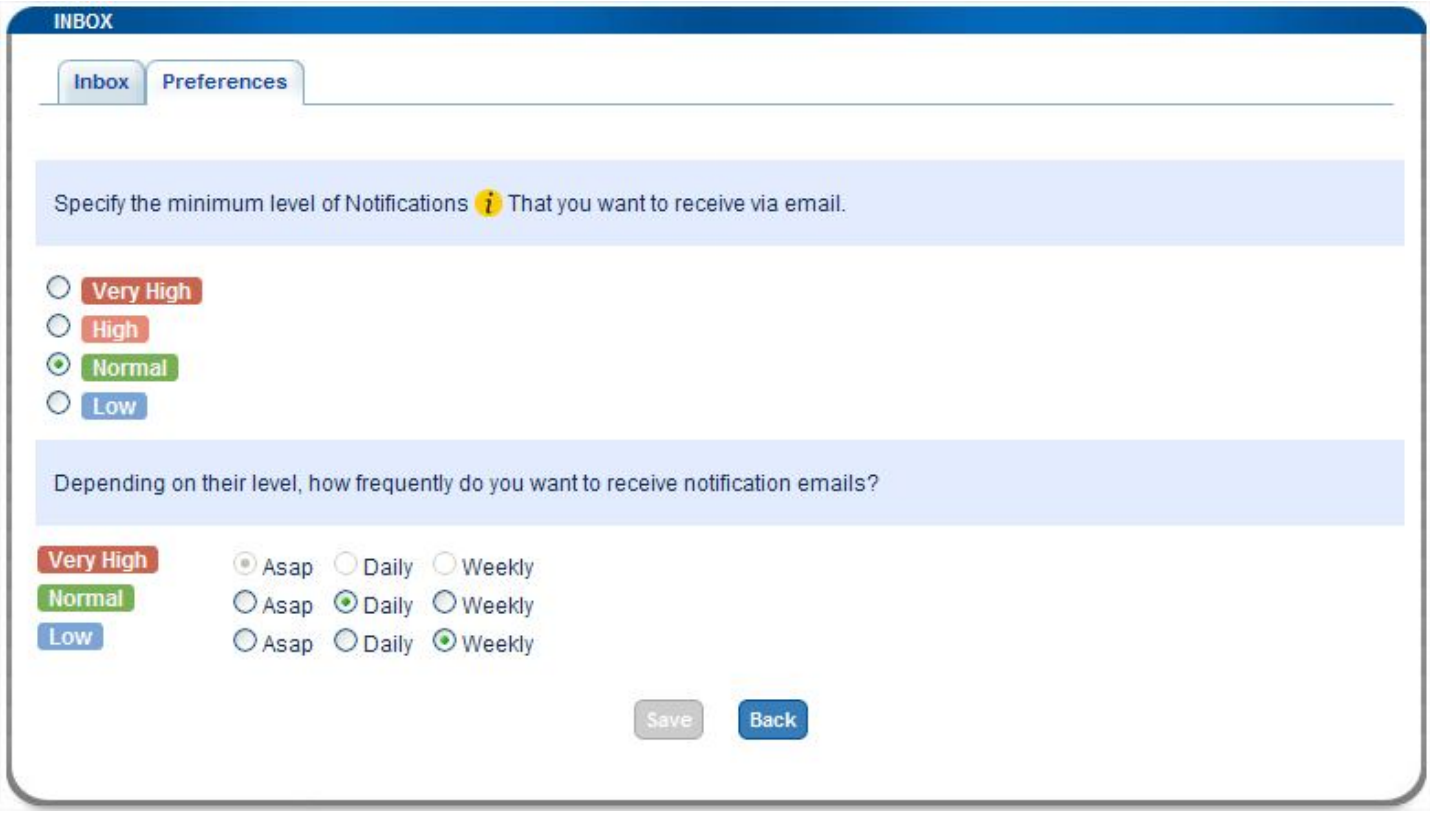


Figure 47: Notifications – Preferences

If you select ***High*** as minimum level of notification you will not receive FP7 calls notification – see **Table 3: Current Notification details**)

If you select ***Asap*** the notification/event is sent immediately.
If you select ***Daily*** the notification/event is sent from midnight.
If you select ***Weekly*** the notification/event is sent Friday from midnight.

The figure above shows you the recommended configuration.

2.9.2 Subscription Criteria

The Participant Portal e-mail notification feature allows the Participant Portal's users to receive notifications about any new information published on a specific call or a group of calls as defined by the user.

Under this tab, the registered users can define the types of calls on which they are interested in receiving information. The users can add/modify or delete the e-mail notification criteria at any time.

You will receive notification e-mails whenever new information is published which meets one of your criteria or when a specific call (chosen previously as your subscription criteria) is reaching a deadline (2 weeks and 1 week).

The criteria are the following:

Global Criteria

- Call categories: Call for Proposals, Call for Tenders

If e.g. Call for Proposal is selected the user will receive notifications for each update on calls for proposals. This can be an update of information, the opening of a call for proposal, the closing of a call for proposal, etc.

- Call States: Open, Closed, Forthcoming

If e.g. Open is selected the user will receive a notification whenever a new call is opened/published.

Other example: if "Call for proposal" is selected and "Open" is selected the user will receive notifications on all "Call for proposals" that are opened.

The criteria can be more specific by choosing a Programme or a theme (see below). Example: if a user chooses COOPERATION/Health he/she will be notified on any change concerning the call for COOPERATION/Health. If "Open" is selected the notification will be limited to the COOPERATION/Health calls that are opened..

Important remark: The "Subscription Criteria" does not reflect the changes you made in the "Your subscribed calls" section See the paragraph below for more explanation about the tab "Your subscribed calls".

Specific Criteria linked to Programmes and themes – see the following print screen (**Figure 48: Subscription criteria*****)***

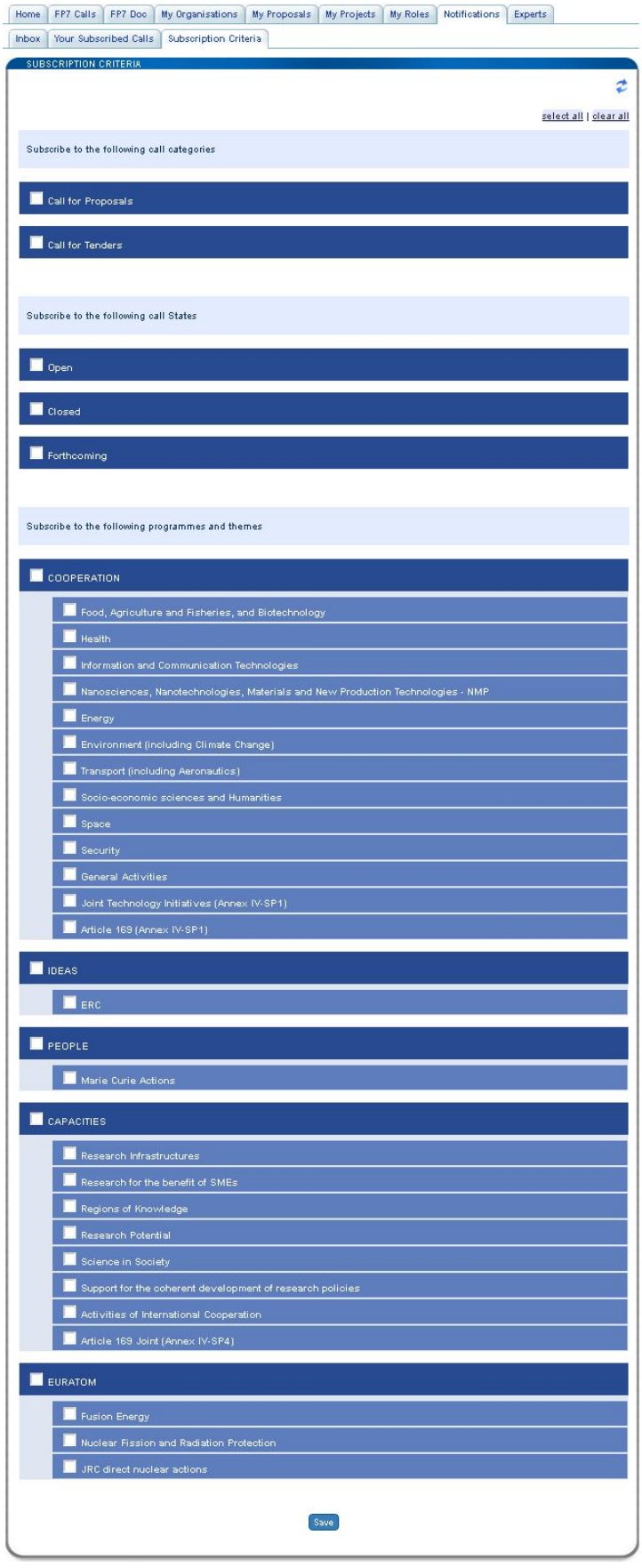


Figure 48: Subscription criteria

2.9.3 Your Subscribed Calls

Under the "Funding" tab, after choosing a specific call, users can subscribe to the e-mail notification related to that selected call. Click on the "*Subscribe to e-mail notification of this call*" link at the bottom of the page, see (Figure 49: Funding – Details of a specific call).

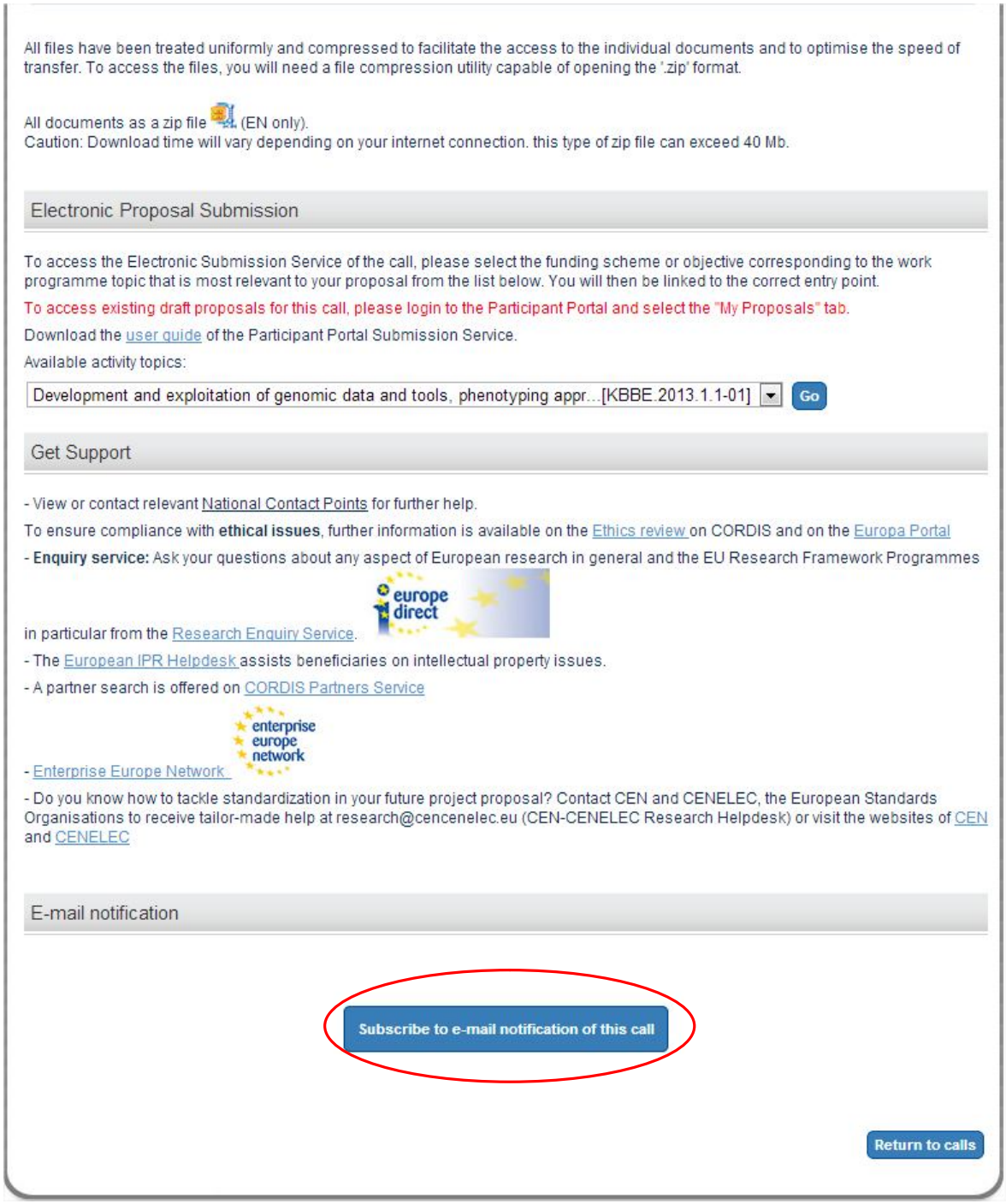

All files have been treated uniformly and compressed to facilitate the access to the individual documents and to optimise the speed of transfer. To access the files, you will need a file compression utility capable of opening the '.zip' format.
All documents as a zip file (EN only).
Caution: Download time will vary depending on your internet connection. this type of zip file can exceed 40 Mb.
Electronic Proposal Submission
To access the Electronic Submission Service of the call, please select the funding scheme or objective corresponding to the work programme topic that is most relevant to your proposal from the list below. You will then be linked to the correct entry point.
To access existing draft proposals for this call, please login to the Participant Portal and select the "My Proposals" tab.
Download the user guide of the Participant Portal Submission Service.
Available activity topics:
Development and exploitation of genomic data and tools, phenotyping appr...[KBBE.2013.1.1-01]
Go
Get Support
- View or contact relevant National Contact Points for further help.
To ensure compliance with ethical issues, further information is available on the Ethics review on CORDIS and on the Europa Portal
- Enquiry service: Ask your questions about any aspect of European research in general and the EU Research Framework Programmes in particular from the Research Enquiry Service.
- The European IPR Helpdesk assists beneficiaries on intellectual property issues.
- A partner search is offered on CORDIS Partners Service
- Enterprise Europe Network
- Do you know how to tackle standardization in your future project proposal? Contact CEN and CENELEC, the European Standards Organisations to receive tailor-made help at research@cencenelec.eu (CEN-CENELEC Research Helpdesk) or visit the websites of CEN and CENELEC
E-mail notification
Subscribe to e-mail notification of this call
Return to calls

Figure 49: Funding – Details of a specific call

The list of calls that you have subscribed to in this way, is displayed in the **"Your Subscribed Calls"** tab.

You can unsubscribe to the subscription to a single call by selecting it and by clicking the **[Unsubscribe]** button. (See Figure 50: Your Subscribed Calls).

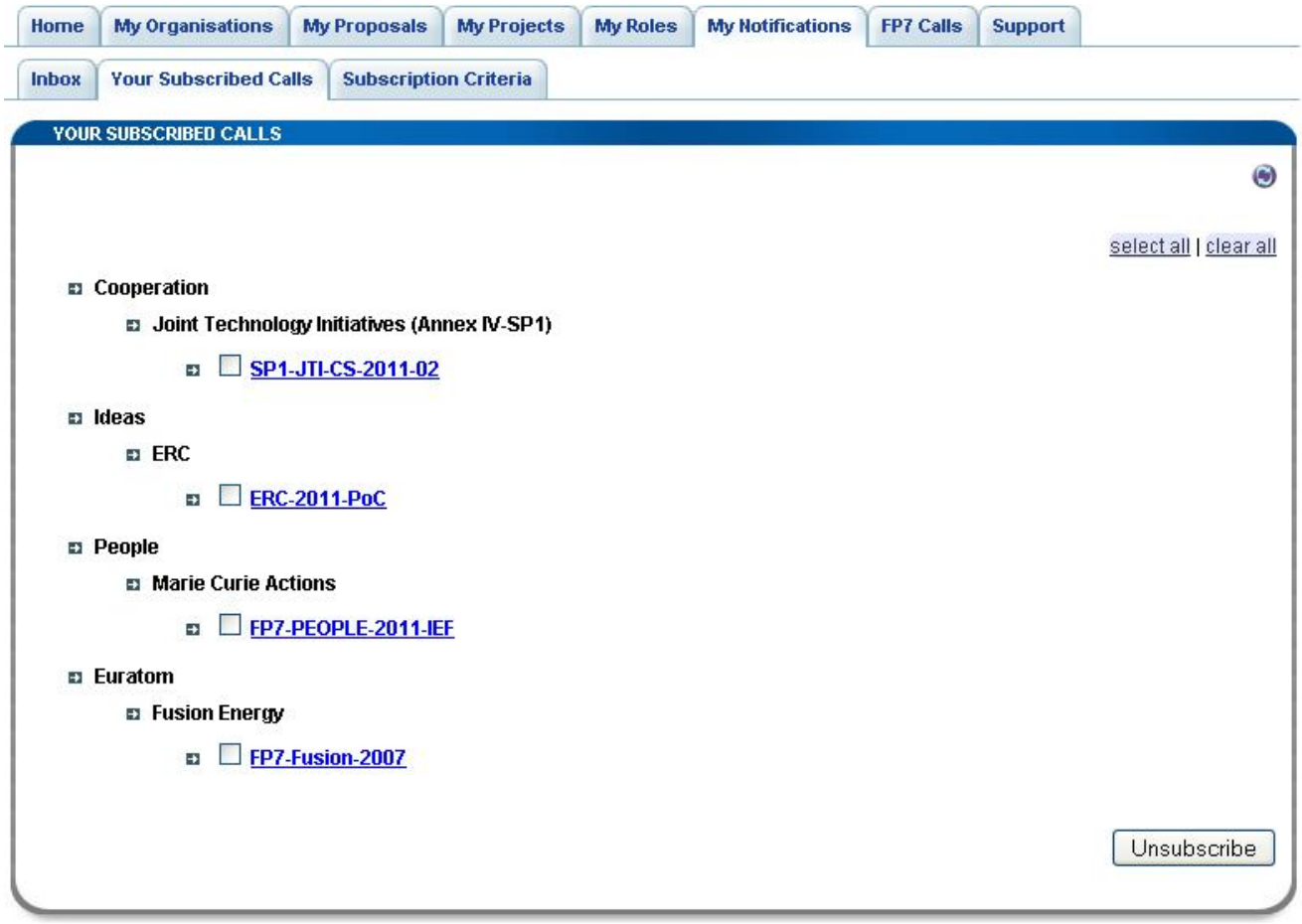


Figure 50: Your Subscribed Calls

2.10 Manage Funding

Any user (logged or not) can have access to the **"Funding"** tab.

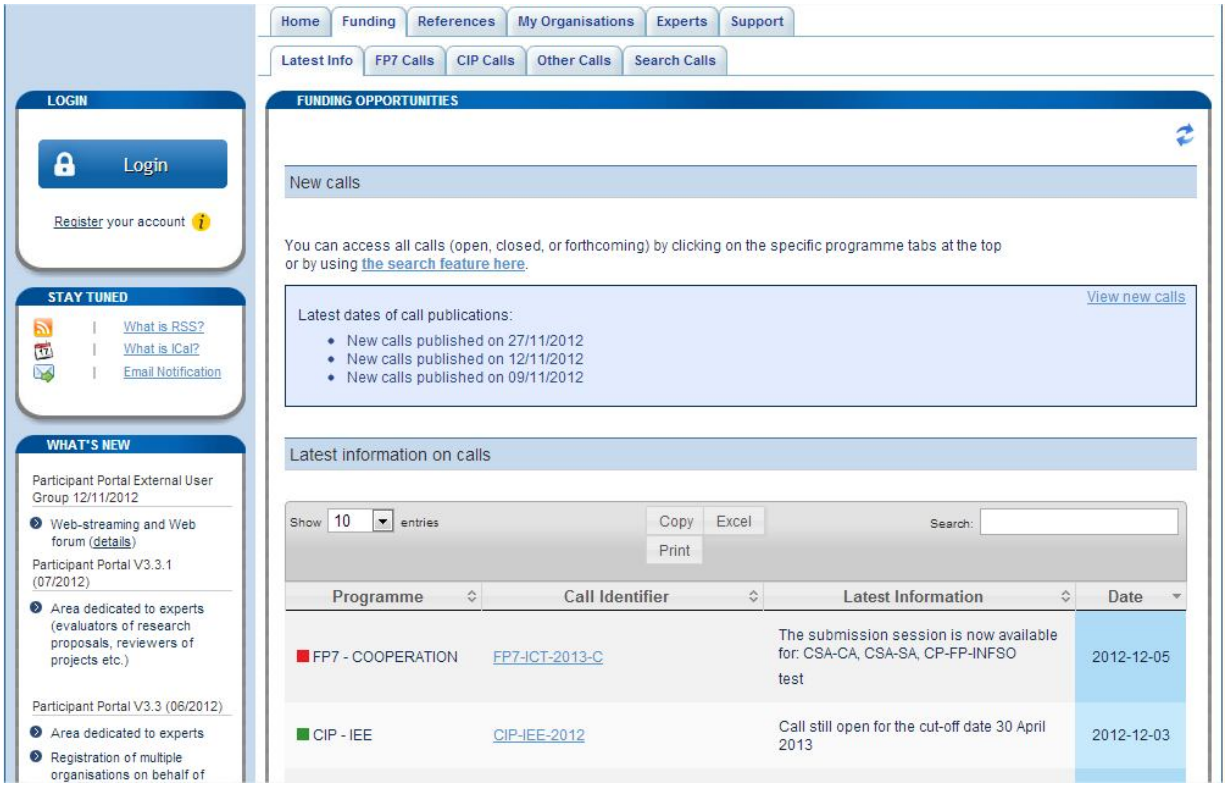


Figure 51: FP7 Calls

When you click on this tab, the **"Latest info"** tab is displayed. It contains the latest dates of call publications and the latest calls published.
These can be filtered by specific Framework programme in the following tabs**: "FP7 calls", "CIP calls", "Other Calls",**.

2.10.1 Calls by Framework Programmes

If you select a particular framework programme, a menu will appear in the left bar allowing you to select one of its particumar specific programmes (See Figure 52 and Figure 53).

Figure 52 - CIP specific programmes

Figure 53 - FP7 specific programmes

2.10.2 Calls by specific programme

When you select a specific programme, the list of open call is displayed by default, the FP7 calls are classified by call type (call for proposal / call for tender) and by theme. (See Figure 54: Calls by programme).

Closed and forthcoming calls are displayed in adjacent tabs with the same classification principle..

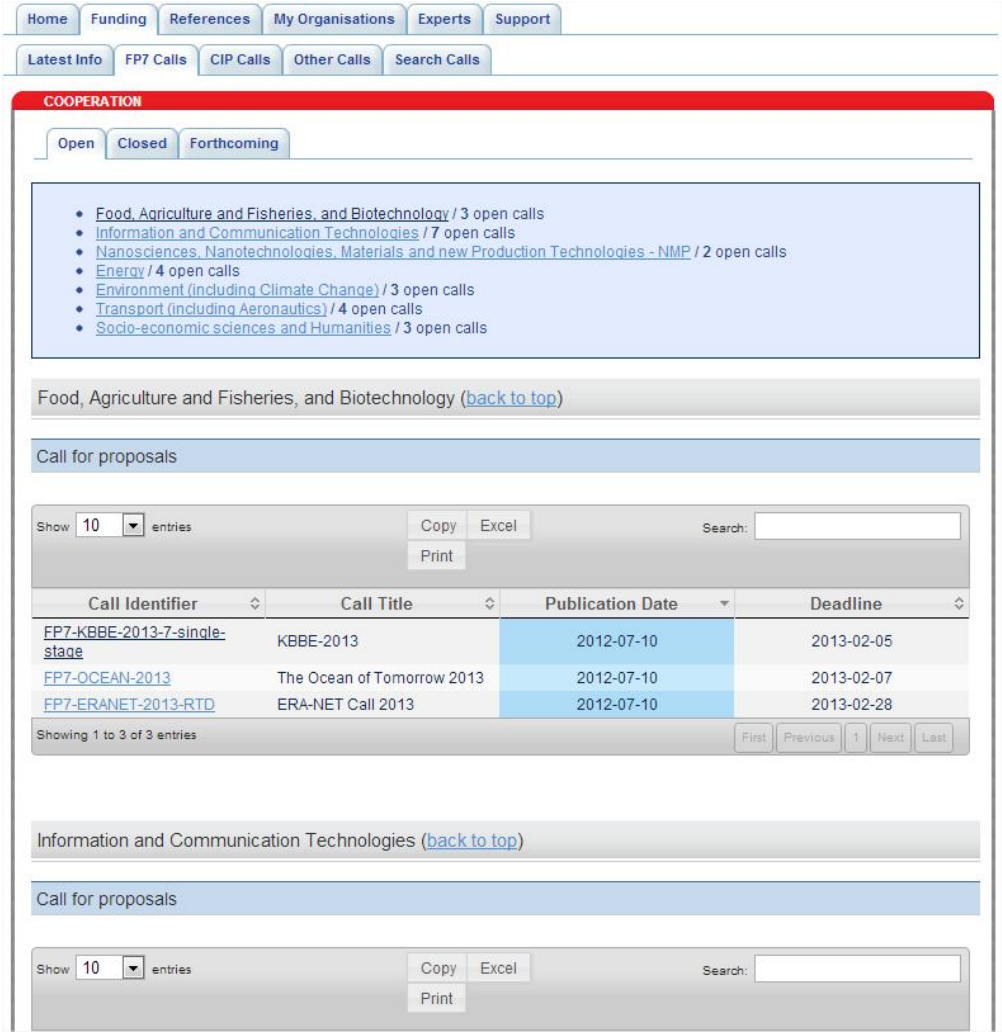


Figure 54: Calls by programme

2.10.3 Call info

When you click on the Call Identifier hyperlink, the call info page is displayed (see Figure 55: Call info). This page contains all the info related to the selected call. You can download documents and subscribe to receive notifications about this call.

You can also be redirected to the Electronic Proposal Submission Service –EPSS (see Figure 56: EPSS) or in the future to the new Submission and Evaluation Program.

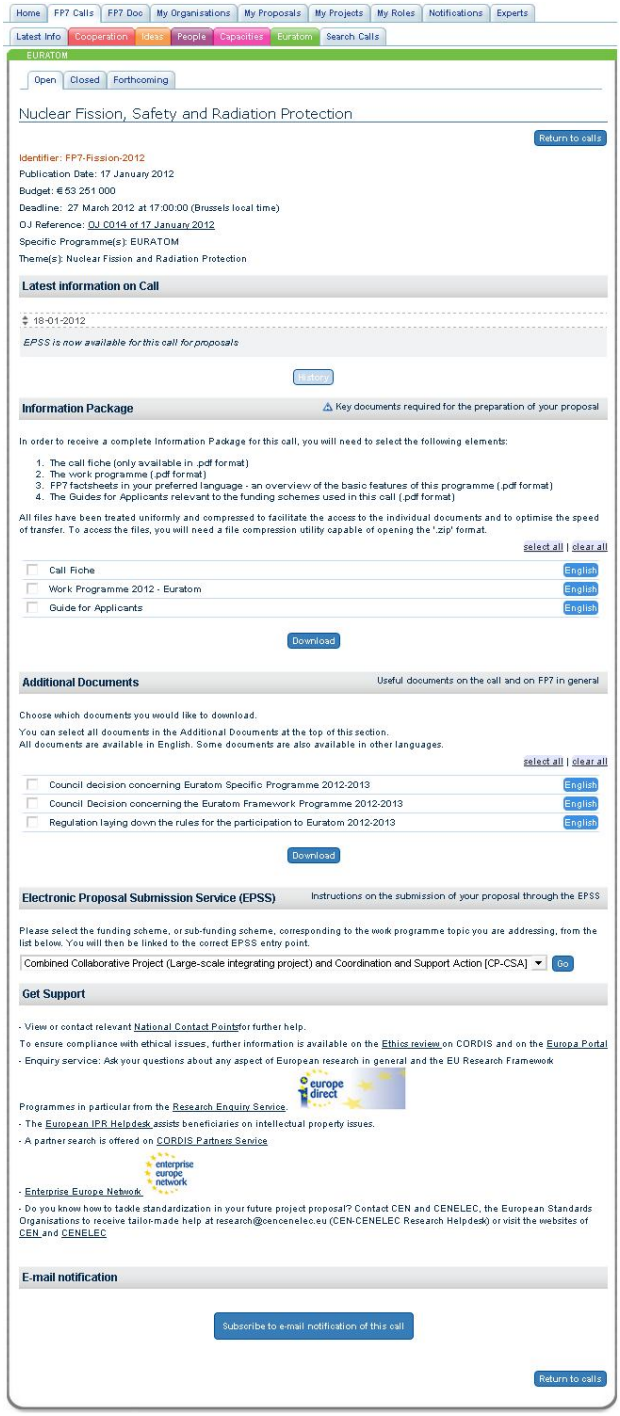

Home
FP7 Calls
FP7 Doc
My Organisations
My Proposals
My Projects
My Roles
Notifications
Experts
Latest Info
Cooperation
Ideas
People
Capacities
Euratom
Search Calls
EURATOM
Open
Closed
Forthcoming
Nuclear Fission, Safety and Radiation Protection
Return to calls
Identifier: FP7-Fission-2012
Publication Date: 17 January 2012
Budget: € 53 251 000
Deadline: 27 March 2012 at 17:00:00 (Brussels local time)
OJ Reference: OJ C014 of 17 January 2012
Specific Programme(s): EURATOM
Theme(s): Nuclear Fission and Radiation Protection
Latest information on Call
18-01-2012
EPSS is now available for this call for proposals
Information Package
Key documents required for the preparation of your proposal
In order to receive a complete Information Package for this call, you will need to select the following elements:
1. The call fiche (only available in .pdf format)
2. The work programme (.pdf format)
3. FP7 factsheets in your preferred language - an overview of the basic features of this programme (.pdf format)
4. The Guides for Applicants relevant to the funding schemes used in this call (.pdf format)
All files have been treated uniformly and compressed to facilitate the access to the individual documents and to optimise the speed of transfer. To access the files, you will need a file compression utility capable of opening the '.zip' format.
select all | clear all
Call Fiche
English
Work Programme 2012 - Euratom
English
Guide for Applicants
English
Download
Additional Documents
Useful documents on the call and on FP7 in general
Choose which documents you would like to download.
You can select all documents in the Additional Documents at the top of this section.
All documents are available in English. Some documents are also available in other languages.
select all | clear all
Council decision concerning Euratom Specific Programme 2012-2013
English
Council Decision concerning the Euratom Framework Programme 2012-2013
English
Regulation laying down the rules for the participation to Euratom 2012-2013
English
Download
Electronic Proposal Submission Service (EPSS)
Instructions on the submission of your proposal through the EPSS
Please select the funding scheme, or sub-funding scheme, corresponding to the work programme topic you are addressing, from the list below. You will then be linked to the correct EPSS entry point.
Combined Collaborative Project (Large-scale integrating project) and Coordination and Support Action [CP-CSA]
Go
Get Support
· View or contact relevant National Contact Points for further help.
To ensure compliance with ethical issues, further information is available on the Ethics review on CORDIS and on the Europa Portal
· Enquiry service: Ask your questions about any aspect of European research in general and the EU Research Framework
europe direct
Programmes in particular from the Research Enquiry Service.
· The European IPR Helpdesk assists beneficiaries on intellectual property issues.
· A partner search is offered on CORDIS Partners Service
enterprise europe network
· Enterprise Europe Network
· Do you know how to tackle standardization in your future project proposal? Contact CEN and CENELEC, the European Standards Organisations to receive tailor-made help at research@cencenelec.eu (CEN-CENELEC Research Helpdesk) or visit the websites of CEN and CENELEC
E-mail notification
Subscribe to e-mail notification of this call
Return to calls

Figure 55: Call info

Electronic Proposal Submission Service (EPSS)
2007 - 2013
EPSS
The EPSS web application is best viewed with
- Internet Explorer 6.0 (and above)
- or Mozilla Firefox 1.0 (and above)
Safari is NOT supported (whatever the OS)
For other browsers please refer to the EPSS User Guide
Attention!
EPSS Helpdesk working hours from 11/07/2011 until 26/08/2011:
the EPSS helpdesk will be available from 9am to 5pm Brussels local time and from 8am to 8pm during 48 hours before calls deadlines.
Welcome to EPSS, the Electronic Proposal Submission Service
Call Selected: ENIAC-2011-2
Sub-Scheme Selected: JTI-CP-ENIAC
I am the coordinator of a proposal and I need a user name and a password
REGISTER[1]
I already have an online user name and a password
LOGIN
I am a participant (not the coordinator) in a proposal and I need a user name and password
CONTACT YOUR COORDINATOR
EPSS user guide
Privacy Statement

Figure 56: EPSS

2.10.4 Search Calls

Any user can use the Search Calls functionality from the **"Funding"** tab, by clicking the **[Search]** button. (See Figure 57: Search Calls).

The user can enter as search criteria: search terms, programme, call status, call type, sorted by information and click **[Search].**

The page is refreshed with the calls matching the request, and an opportunity to Search again.

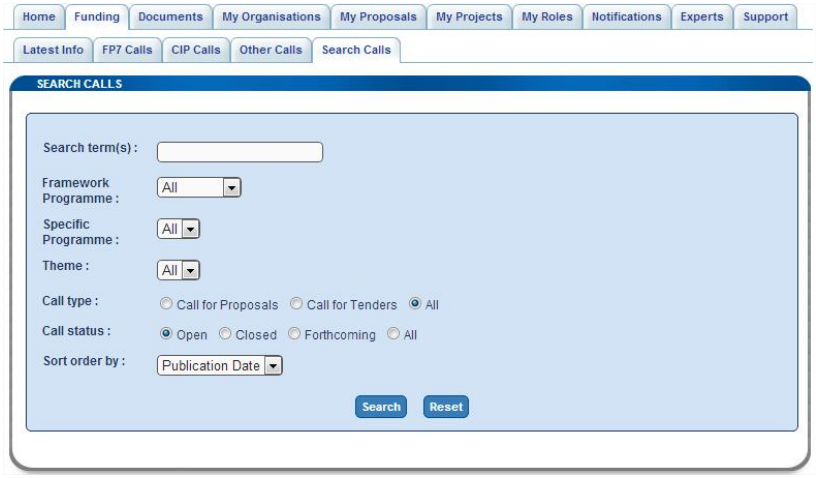


Figure 57: Search Calls

2.11 Manage Experts

A top level tab (**"Experts"**)is used for the experts management (see Figure 58: PP home page below). This tab is displayed for all logged-in and not logged in users. For users that are not logged in, it displays a home page inviting users to take some actions:
If you are are logged in, some different actions need to be executed

2.11.1 Not logged in users

.

A to Z | Sitemap | Search | About this site | Contact | Legal Notice | English (en)
European Commission
RESEARCH & INNOVATION
Participant Portal
European Commission > Research & Innovation > Participant Portal > Home
Home
Funding
Documents
My Organisations
Experts
Support
LOGIN
Login
Register your account
NEED HELP?
Frequently Asked Questions
(NEW) Experts area (Quick info)
User manual
(NEW) Electronic proposal submission user manual
Presentations
(NEW) Submission of proposals
Contact the Helpdesk
WHAT'S NEW
Participant Portal External User Group 12/11/2012
Web-streaming and Web forum (details)
Participant Portal V3.3.1 (07/2012)
Area dedicated to experts (evaluators of research proposals, reviewers of projects etc.)
Participant Portal V3.3 (06/2012)
Area dedicated to experts
Registration of multiple organisations on behalf of others
Print, export and copy functions
New action buttons in My Organisations and My Project
WELCOME
Welcome to the Participant Portal
The Participant Portal is your entry point for electronic administration of EU-funded research and innovation projects, and hosts the services for managing your proposals and projects throughout their lifecycle.
Currently the portal covers mainly actions under the 7th EU-Framework Programme for Research and Technological Development (FP7). In the future, its coverage will be extended to other programmes in the area of research and innovation.
What does it offer today?
You can search for FP7 calls for proposals and submit your proposals.
Depending on your role in projects and organisation, you can view information on projects, negotiate your grant agreement, manage amendments, submit financial and scientific reports or review projects.
If you are interested in participating as an expert for the European Commission, you can join the database of independent experts for European research and innovation
You can search for the unique identifier of your organisation, register your organisation or provide updates of your organisation's data.
Depending on your roles in projects and organisations, you can assign or revoke access rights to organisation and project data for other persons.
Forthcoming functionalities
Expert evaluators will be able to manage the administrative details related to their work as peer reviewers.
The currently separate electronic proposal submission system will be replaced by a new system integrated in the portal.
Direct access to FP7 related information and documentation.
How does it work?
Are you a new user?
1
While some basic functions are available for anonymous users, the core functions of project management are only available to registered users. If you are a registered user you can use the login button.
2
After login, the actual homepage will be replaced by a new one displaying all the processes your user profile can access.
3
On that new page, the blue arrows are the processes that are authorised for your profile and they will give you access to several lists, like the list of organisations, projects, roles of your project etc...
4
When you go into the details of an organisation, project, role etc... a new contextual menu will guide you through the additional actions.
FP7
Research Site

Figure 58: PP home page

For not 'logged in' connected users (anonymous) the Expert tab is displayed in the following portlet (**Figure 59: Experts tab - anonymous user**):

A to Z | Sitemap | Search | About this site | Contact | Legal Notice English (en)
European Commission
RESEARCH & INNOVATION
Participant Portal
European Commission > Research & Innovation > Participant Portal > Experts > Welcome
Home
Funding
Documents
My Organisations
Experts
Support
LOGIN
Login
Register your account
HELP FOR EXPERTS
FAQ
Technical help
Question about FP7
NEWS FOR EXPERTS
Welcome to the brand new area in the Participant Portal dedicated to experts. A new registration service is now available.
QUICK LINKS FOR EXPERTS
List of appointed experts
Expert recommendations
Logistics for Brussels
Map of evaluation area
Info on hotels
Metro map
From airport to Brussels
EXPERT AREA
Join the database of independent experts for European research and innovation
The European Commission appoints independent experts to assist with research and innovation assignments including the evaluation of proposals, the review of projects and the monitoring of programmes or policies.
New Experts
What do the assignments involve?
Experts, as peer reviewers, assist in the:
- evaluation of research and innovation proposals;
- review of research and innovation projects.
In addition experts assist in:
- monitoring the progress, outcome and impact of research and innovation programmes as well as giving advice on the shape of future research and innovation activities.
Assignments mainly concern research and technological development, falling within the current framework programme (FP7) aimed at improving employment, competitiveness and quality of life in Europe.
Take a look at the most recently funded projects.
Who can be an Expert?
You have a chance of being selected as an expert if you:
have a high level expertise in research or innovation in any scientific and technological field, including managerial aspects;
have at least a university degree, and
can be available for occasional, short-term assignments.
Registered Experts
Already registered with CORDIS/EMM ?
First create an ECAS account, if you have not created one yet, in order to have the possibility to retrieve your CORDIS/EMM profile.
Some changes to the design of the new registration service require additional information from experts, so please log-in and update your profile.
Interested in participating as an expert for the European Commission?
1
Create your ECAS Account.
2
Register or update your profile

Figure 59: Experts tab - anonymous user

In this page, the *Create Your Ecas Account* link is enabled while the *Register or update your profile* is not.
Create Your Ecas Account opens a page to create ECAS account at https://webgate.ec.europa.eu/cas

2.11.2 Logged in users without Expert profile defined in EMPP

If a "logged-in" user selects the **Experts** tab and if he does not have an Expert profile, he will see a similar page as non-logged users except the fact that the *Register or update your profile* link that is now activated while the *Create your ECAS account* link is deactivated (see Error! Reference source not found.)

A to Z | Sitemap | Search | About this site | Contact | Legal Notice English (en)
European Commission
RESEARCH & INNOVATION
Participant Portal
European Commission > Research & Innovation > Participant Portal > Experts > Welcome
Home
Funding
Documents
My Organisations
My Proposals
My Projects
My Roles
Notifications
Experts
Support
LOGIN
Logout
Christian HUWAERT
In addition to logging out, you must close all your browser windows to avoid any unauthorised access
HELP FOR EXPERTS
FAQ
Technical help
Question about FP7
NEWS FOR EXPERTS
Welcome to the brand new area in the Participant Portal dedicated to experts. A new registration service is now available.
QUICK LINKS FOR EXPERTS
List of appointed experts
EMEX
Expert recommendations
Logistics for Brussels
Map of evaluation area
Info on hotels
Metro map
From airport to Brussels
EXPERT AREA
Join the database of independent experts for European research and innovation
The European Commission appoints independent experts to assist with research and innovation assignments including the evaluation of proposals, the review of projects and the monitoring of programmes or policies.
New Experts
What do the assignments involve?
Experts, as peer reviewers, assist in the:
- evaluation of research and innovation proposals;
- review of research and innovation projects.
In addition experts assist in:
- monitoring the progress, outcome and impact of research and innovation programmes as well as giving advice on the shape of future research and innovation activities.
Assignments mainly concern research and technological development, falling within the current framework programme (FP7) aimed at improving employment, competitiveness and quality of life in Europe.
Take a look at the most recently funded projects.
Who can be an Expert?
You have a chance of being selected as an expert if you:
have a high level expertise in research or innovation in any scientific and technological field, including managerial aspects;
have at least a university degree, and
can be available for occasional, short-term assignments.
Registered Experts
Already registered with CORDIS/EMM ?
First create an ECAS account, if you have not created one yet, in order to have the possibility to retrieve your CORDIS/EMM profile.
Some changes to the design of the new registration service require additional information from experts, so please log-in and update your profile.
Interested in participating as an expert for the European Commission?
1
Create your ECAS Account
2
Register or update your profile

Figure 60: Logged in users without Expert profile

"Register or update your profile" opens the "*Import/create Expert Profile*" page (see Figure 61: Import/Create Export profile).

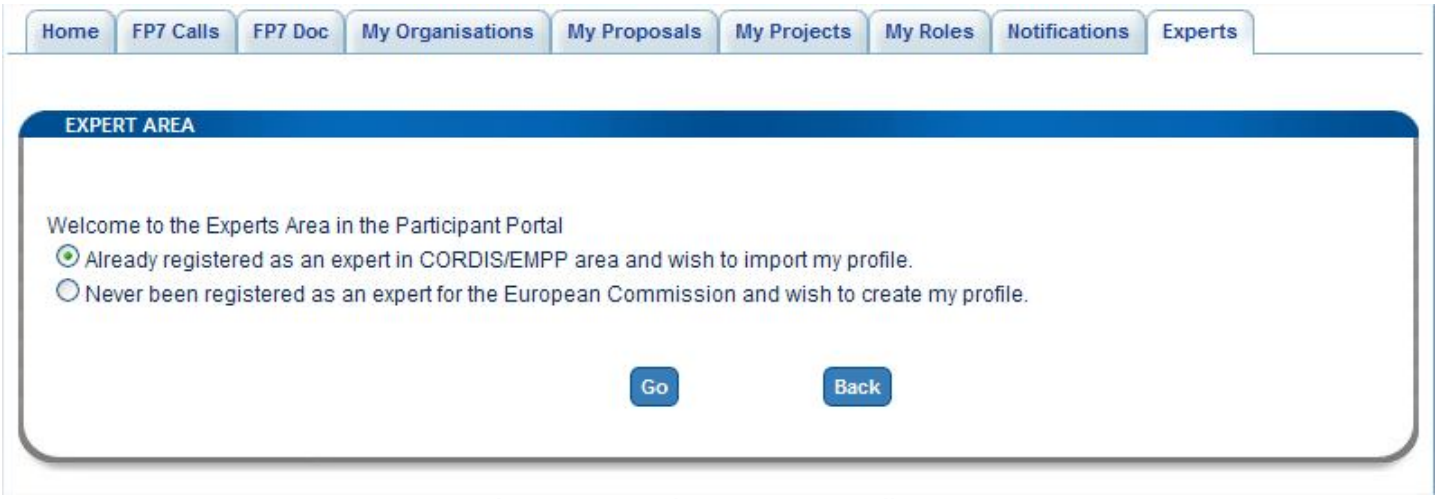


Figure 62: Import/Create Export profile

If "*Never been registered as an expert ...*" is selected, by clicking the **[Go]** button it opens the following page in the Participant Portal (see Figure 63: Create your profile)
The **[Create profile]** button opens EMPP where the user can define his profile (see Figure 64: EMPP).

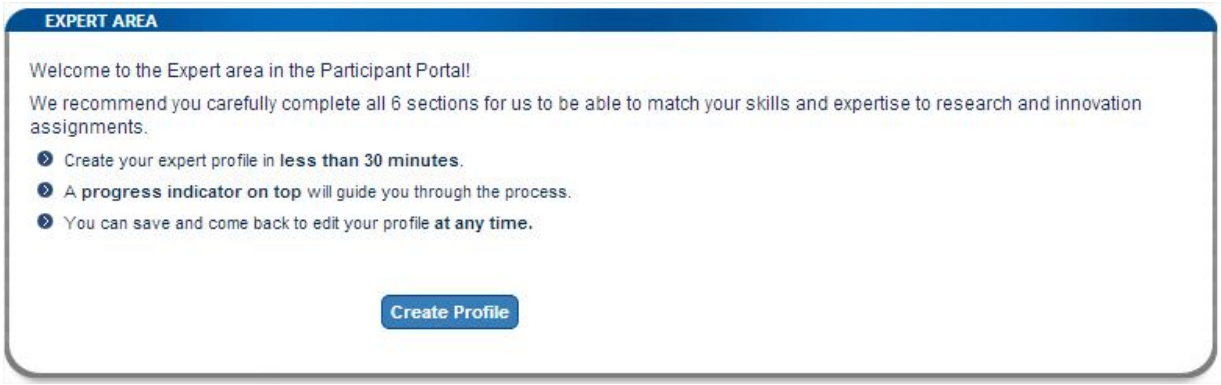

EXPERT AREA
Welcome to the Expert area in the Participant Portal!
We recommend you carefully complete all 6 sections for us to be able to match your skills and expertise to research and innovation assignments.
Create your expert profile in less than 30 minutes.
A progress indicator on top will guide you through the process.
You can save and come back to edit your profile at any time.
Create Profile

Figure 63: Create your profile

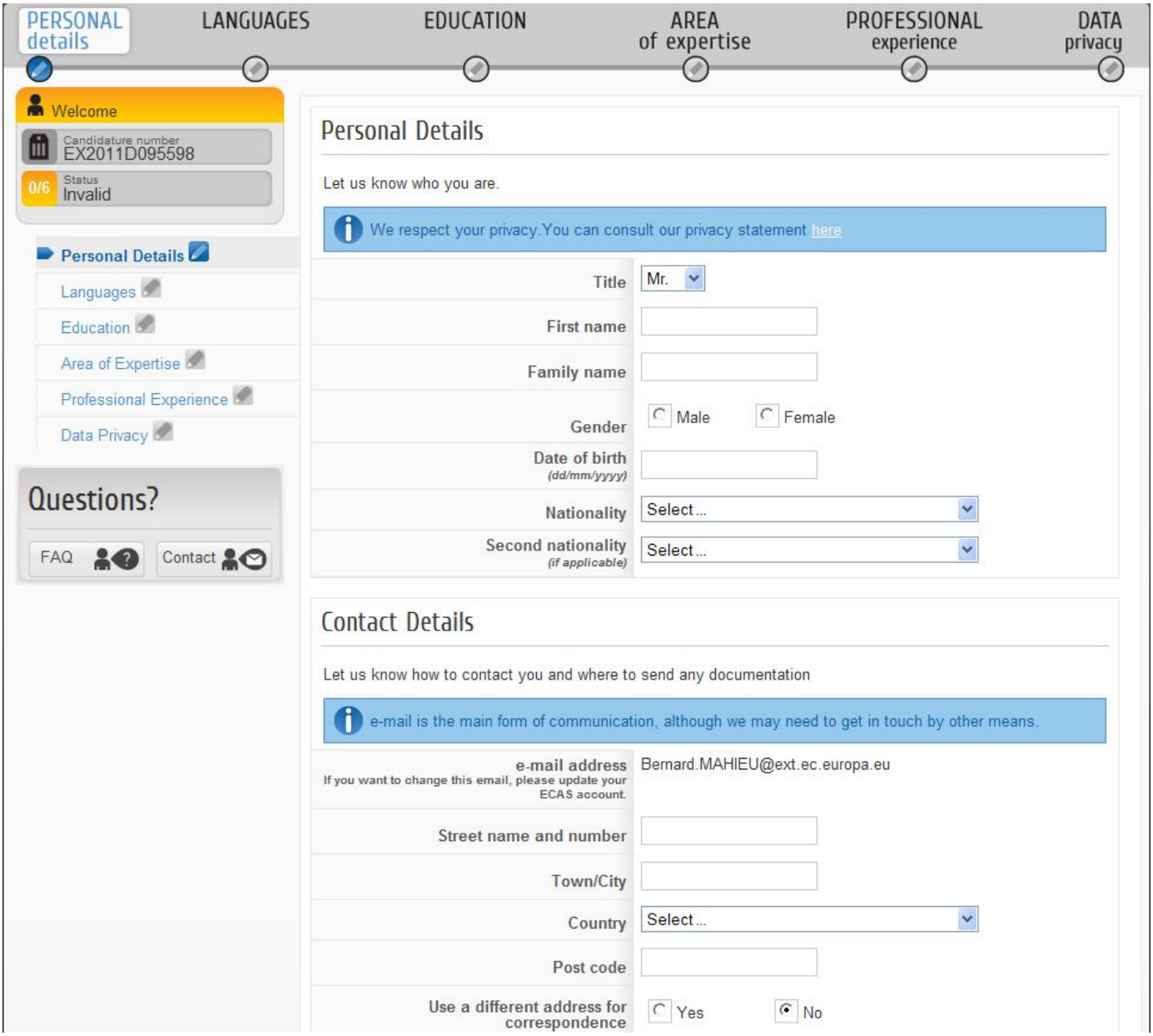


Figure 64: EMPP

If " *Already registered as an expert in CORDIS and wish to import my profile* " is selected, by clicking the **[Go]** button it opens the Expert profile import (see Figure 65: Import Expert profile from CORDIS).

2.11.2.1 **Import Expert profile from CORDIS**

The user has to enter his user name and password **previously used in CORDIS**

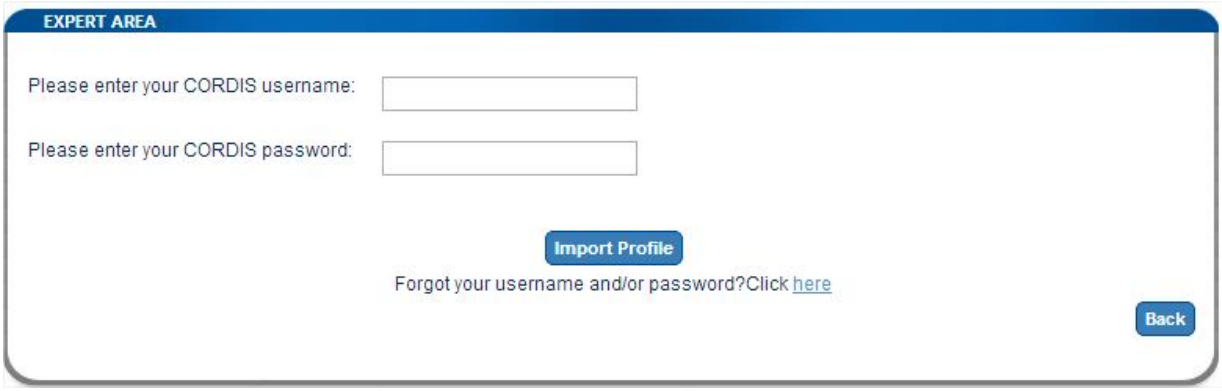


Figure 65: Import Expert profile from CORDIS

If the entered data is OK, you can click the **[Import profile]** button, in order to import his data from CORDIS.
If the import is successful, the exported Expert profile is displayed.

If the manual import cannot be processed due to various reasons then the user is presented with the following message:
"*We are sorry but your profile cannot be imported at this time. Please try again later. If the problem persists, please contact the Help-Desk (hyperlink to eFP7 Service Desk form).*"

If you forgot your user name and/or password, you can recover them by clicking the *Click here* hyperlink and be directed to the password/user name recovery (see Figure 66: Recover user name /password from CORDIS)
The **[Back]** buttons goes back one step up.

2.11.2.2 **Recover CORDIS profile**

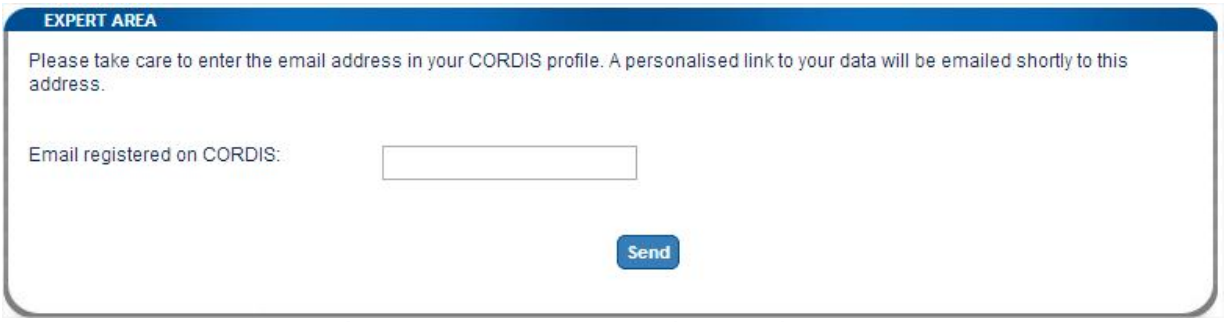

EXPERT AREA
Please take care to enter the email address in your CORDIS profile. A personalised link to your data will be emailed shortly to this address.
Email registered on CORDIS:
Send

Figure 66: Recover user name /password from CORDIS

You have to enter your email address recorded in CORDIS. By clicking on the **[Send]** button, the application requests CORDIS to send an email with a link allowing the user to recover his CORDIS user name and password. The mail is sent to your mailbox associated with your ECAS account. A copy of this mail can also be found in the **My Notifications** tab.

If the email address is not valid then an error message "*Invalid email address. Please check the email address provided to CORDIS.* " is displayed.

The **[Quit]** button is used to return to home page for not logged in experts (**see** Error! Reference source not found.)

When the Expert profile is imported from Cordis you are redirected to the Expert Profile page (see **Error! Reference source not found.**)

2.11.3 Logged users with Expert profile imported from Cordis

When the user logs in for the **first time** in the PP (expert area) and if he uses, in ECAS, an email address already registered on his CORDIS profile then his EMPP profile will automatically be imported and associated with his ECAS account

When the Expert profile of a new EMPP user has been automatically imported from CORDIS, then the following portlet is displayed in the **"Expert"** tab (see **Error! Reference source not found.**)

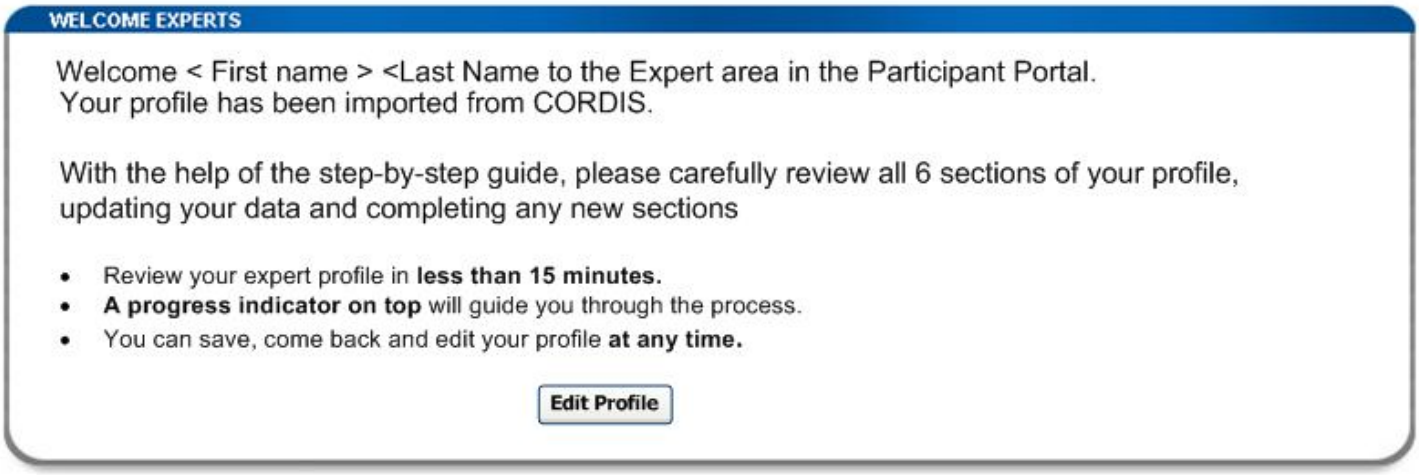

WELCOME EXPERTS
Welcome < First name > <Last Name to the Expert area in the Participant Portal.
Your profile has been imported from CORDIS.
With the help of the step-by-step guide, please carefully review all 6 sections of your profile, updating your data and completing any new sections
Review your expert profile in less than 15 minutes.
A progress indicator on top will guide you through the process.
You can save, come back and edit your profile at any time.
Edit Profile

Figure 67: Expert profile after import from CORDIS

The **[Edit profile]** button opens EMPP and takes the expert to the 'personal details' page and users review all screens to edit the profile.

2.11.4 Logged in users with Expert profile defined in EMPP

When logged experts open the **"Expert"** tab then the following portlet is displayed

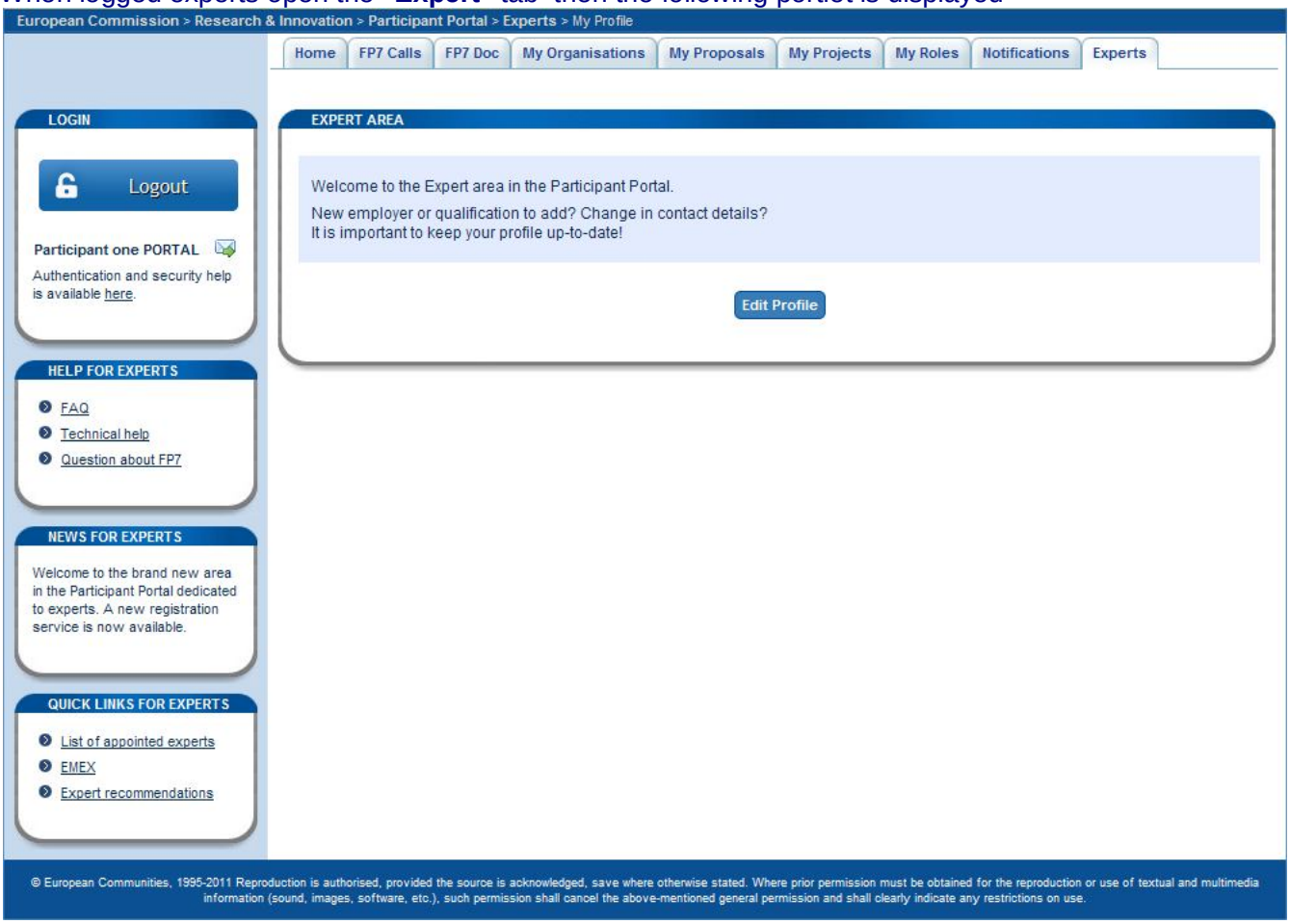

European Commission > Research & Innovation > Participant Portal > Experts > My Profile
Home
FP7 Calls
FP7 Doc
My Organisations
My Proposals
My Projects
My Roles
Notifications
Experts
LOGIN
Logout
Participant one PORTAL
Authentication and security help is available here.
HELP FOR EXPERTS
FAQ
Technical help
Question about FP7
NEWS FOR EXPERTS
Welcome to the brand new area in the Participant Portal dedicated to experts. A new registration service is now available.
QUICK LINKS FOR EXPERTS
List of appointed experts
EMEX
Expert recommendations
EXPERT AREA
Welcome to the Expert area in the Participant Portal.
New employer or qualification to add? Change in contact details?
It is important to keep your profile up-to-date!
Edit Profile
© European Communities, 1995-2011 Reproduction is authorised, provided the source is acknowledged, save where otherwise stated. Where prior permission must be obtained for the reproduction or use of textual and multimedia information (sound, images, software, etc.), such permission shall cancel the above-mentioned general permission and shall clearly indicate any restrictions on use.

Figure 68: Expert profile in PP

The **[Edit profile]** button opens EMPP and takes the expert to the 'personal details' page (see Error! Reference source not found.)

2.12 Logged in users with JTI Representative or Member State Representative role

Through the **"Expert"** tab , EMPP will be used to provide access to the database of experts for users that have the following roles:

- Member State and countries associated to the Framework Programme contact points (representatives of the Member States and FP Associated Countries)
- JTIs contact points (representatives of JTIs)

Member State and Associated Country contacts are able to search through the group of experts that have explicitly allowed their profile to be made available to them, while JTI contacts will be able to search through the group of experts that have explicitly allowed their profile to be made available to them.

2.13 RSS

2.13.1 What is the RSS format?

RSS is a data presentation format facilitating the automated broadcast of information streams to Internet users. It also facilitates the syndication of content by giving other web sites the opportunity to reproduce such data, in full or in part, with ease.
With the RSS format there is no need to visit your favourite sites one by one to receive news from them; all you have to do is enter their RSS information stream into a compatible program and all your news sources will appear on a single screen!
In this way, by receiving Research Participant Portal information streams you can read the latest news published on our site on your computer screen without even having to visit our homepage.

2.13.2 How to access RSS feeds

There are several ways to receive information streams published by Research Participant Portal on your computer.

You can:

- use your e-mail application to consult this information source while reading your e-mails
- use your Internet browser to display the various newsfeeds in the form of a homepage
- use specialist RSS information stream aggregation software, known as an RSS reader or news aggregator or even read information streams on your Smartphone, PDA or pocket PC connected via Bluetooth to a GRPS mobile phone.

Whichever method you choose, you must register the URL of each newsfeed you wish to receive in the chosen software. This is a very simple operation - often it only takes a click of your mouse

indeed, most sites broadcasting information streams display a small icon on their RSS or XML pages. By clicking on the icon, your software application will recognise the information stream automatically and add it to your content aggregation list.

2.13.3 What do they look like?

For a first look at a newsfeed, without installing anything on your computer, you can use an online RSS reader which can read any RSS feed. Open a new window in your browser and enter one of the following URLs in the address field:

- *RSS Feed - Latest Call information*
- *RSS Feed - Recently published Calls*

This is what a Research Participant Portal RSS feed looks like. If you wish to view another feed, simply enter its address in the address field. Now you can move on to the next step by installing a real content aggregation tool.

There are content aggregators to suit all users and all platforms; many are available free of charge.

2.13.4 Step by step

2.13.4.1 How can I read RSS feeds?

You will need a news reader to check the feeds you subscribe to and let you view headlines and links to newly published content. See below for details of how to get a reader if you don't currently have one

RSS feeds, on this site, are indicated by orange icons next to the title of a specific RSS feed.

Clicking the icon will take you to a page that describes the feed in greater detail. From there you can click a link to open the feed window. Copy and paste its URL into your newsreader to subscribe.

Some browsers including Internet Explorer 7+, Firefox, Opera, Safari and Chrome, automatically support RSS and do not require you to paste the feed URL into a separate reader.

If you have difficulties subscribing to a feed, please refer to the instructions that come with your reader.

When new content is published, you can use the reader to scan headlines and click through to our web site to view the full version of the article or feature.

2.13.4.2 How do I get a news reader?

There are many different versions of newsreaders, some accessed using a browser and some which are downloadable applications. Deciding which one to use is a matter of personal choice. Different readers work on different operating systems, so you will need to choose one that will work with your computer.

Below is a list of popular readers that you may wish to use:

***Windows**:*

- *Feeddemon*
- *Newzcrawler*

***Mac OSX**:*

- *NetNewsWire*

***Web**:*

- *Bloglines*
- *Google Reader*

o How do I unsubscribe from an RSS feed?

Please refer to the instructions that come with your browser or newsreader if you would like to unsubscribe from an RSS feed.

2.13.4.3 Webmasters

Content contained in Research Participant Portal RSS feeds can be added to websites a number of different ways. Each method for displaying the RSS feed has pros and cons associated with it. Webmasters will need to determine which option will best meet their hosting and technology needs.

***Using JavaScript to Display RSS**:*

JavaScript is the easiest way to display RSS feeds on a website. There are a number of sites that will allow you to generate code that can be inserted into a website. The JavaScript will auto-update, showing the latest headlines as the feed is updated. Each time a visitor visits the website the JavaScript pulls the data from the feed. Often, the various scripts can be customized so that the look of the feed can be made to match a specific web site feeds with hopes that the search engines will devour and spider the contents, you will be disappointed. When JavaScript is used to display RSS feeds, search engines do not actually "see" the contents of the feed, meaning that the search engines will not index the contents of the feed within the website.

***Feedroll**:*

Feedroll is a free service for syndicating RSS and ATOM news feeds on your website. Simply select a feed, customize the design, then copy and paste the code provided onto your page - *Feedroll*

***Using PHP to Display RSS**:*

PHP is a slightly more complex solution for displaying RSS. Like JavaScript, as the contents of the feed updates, the web page contents will update as the page is refreshed. The benefit of using PHP to display RSS is that the contents of the feed displayed with the webpage can be spidered and indexed by search engines. The result is a feed that always displays the most current information from the RSS feed and the web page content is considered search engine spider and robot-friendly.

***rss2html.php**:*

The rss2html.php script allows users to create web pages that will always display the most current information from the RSS feed, and because the resulting page is pure HTML, it will be in a format friendly to search engine robots. Using rss2html.php, webmasters can customize the format and look of the web page created from the feed. The RSS feed's contents can easily be integrated into an existing website's theme. The rss2html.php script parses the RSS file, extracts the pertinent information, formats it, and serves it up as regular HTML - *Feedforall*

***Using ASP to Display RSS**:*

ASP is similar to PHP. The free ASP/ASP.NET scripts can be used to convert RSS feeds into HTML and display on ASP/ASP.NET web-server.

***rss2html.asp**:*

ByteScout has implemented a guide for displaying of RSS/XML feed using free RSS2HTML.ASP script in ASP or ASP.NET environment. This script can be used free of charge on any ASP or ASP.NET web-server and generate HTML from RSS feed. This free ASP script uses MSXML to load RSS feed from URL and display it. You can use it as a standalone or call from script on HTML page to generate HTML content from RSS feed and then display on your HTML page - *Bytescout*

***RssFeed**:*

RssFeed is an open-source custom ASP.NET server control that displays the contents of a specified RSS feed in an ASP.NET web page - *RssFeed*

If PHP or ASP is used to update feeds, the website will have free fresh, relevant content each time the feeds referenced are updated.

***Export RSS to HTML**:*

If you wish to dress up the feed's appearance you can use a template exporting the feed as HTML or an HTML table. Publishers can incorporate exported tables into an HTML template using a server-side include. Each time the feed is updated, the feed will need to be exported to HTML and uploaded along with the feed. Though this only takes a few moments, exporting RSS to HTML does require webmaster intervention to update the content. The end result, though, is a complete web page with an RSS feed in it that will be search engine-friendly.

***FeedForAll**:*

FeedForAll allows users to export RSS feeds from RSS to HTML. The look of the HTML can be modified to match an existing website's design - *Feedforall*

***Using Services**:*

There are a number of services available that host and display RSS feeds, in many cases free of charge. Because these services operate on a different domain server there is little benefit to end-users displaying their feeds in this fashion. That said, the services are generally free of charge, so you get what you pay for.

***RSS2HTML.com**:*

Select a layout, colour scheme and enter the URL of the feed. A web page URL will be generated that will display the feed in the selected scheme - *RSS2hTML*

***FeedBurner**:*

FeedBurner provides a number of online services. Among them is a service that displays RSS feeds on a website - *Feedburner*

***Using XSL to Display RSS**:*

Although using XSL and CSS style sheets to display XML directly is easy to understand in theory, it is rather tricky to implement in the real world and is very tough for novices to use successfully. Webmasters must be fairly familiar with CSS and XSL to have the formatting work well, and webmasters then have to address browser incompatibilities and exceptions. As a result, not a lot of resources or services yet exist to display RSS using XSL.

Using highly targeted feeds, webmasters can enhance their websites with themed content. Ultimately, providing relevant, educational or newsworthy information from reputable related sources will establish expertise in a specific area.

2.13.5 Research Participant Portal RSS feeds

In the Participant portal, you have to open the "Funding" tab . In the "Stay Tuned" element (on the left column) click on the RSS icon (see Figure 69: Stay tuned - RSS).

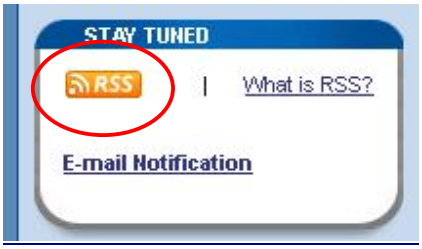


Figure 69: Stay tuned - RSS

If you select the RSS orange icon, you will be presented with a choice of RSS feeds that you can subscribe to (see Figure 70: RSS - Choose your feed)
RSS Feed - Latest Call information
RSS Feed - Recently published calls

Figure 70: RSS - Choose your feed

In the Subscription page, you can filter the content of the Common Feed list (depending on your browser. See Figure 71: Feed Subscription on Internet Explorer and Figure 72: Feed Subscription on Mozilla using Google)

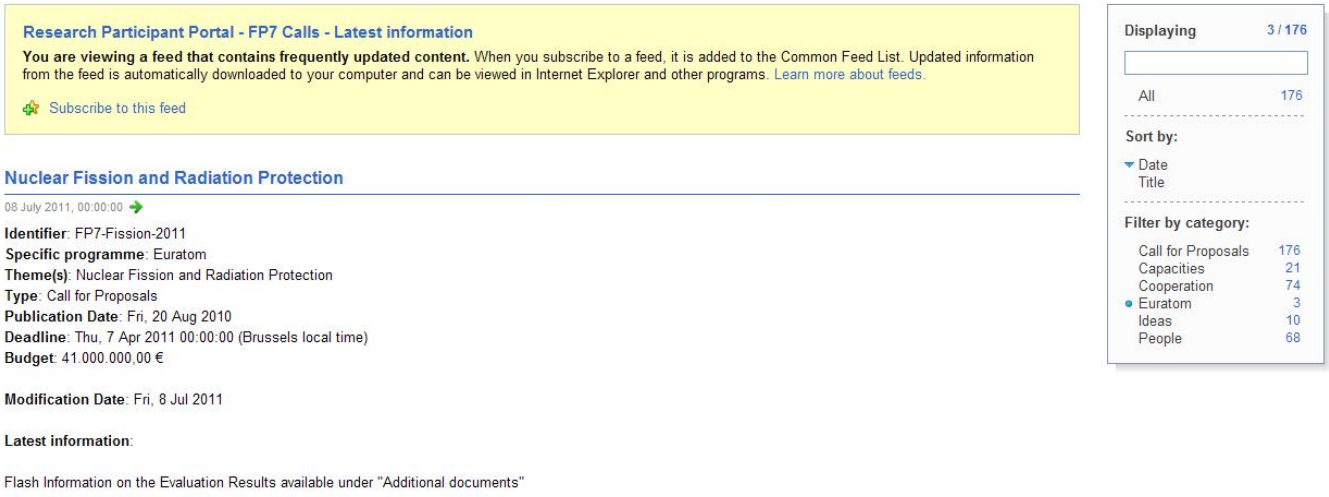

Research Participant Portal - FP7 Calls - Latest information
You are viewing a feed that contains frequently updated content. When you subscribe to a feed, it is added to the Common Feed List. Updated information from the feed is automatically downloaded to your computer and can be viewed in Internet Explorer and other programs. Learn more about feeds.
Subscribe to this feed
Nuclear Fission and Radiation Protection
08 July 2011, 00:00:00
Identifier: FP7-Fission-2011
Specific programme: Euratom
Theme(s): Nuclear Fission and Radiation Protection
Type: Call for Proposals
Publication Date: Fri, 20 Aug 2010
Deadline: Thu, 7 Apr 2011 00:00:00 (Brussels local time)
Budget: 41.000.000,00 €
Modification Date: Fri, 8 Jul 2011
Latest information:
Flash Information on the Evaluation Results available under "Additional documents"
Displaying 3 / 176
All 176
Sort by:
Date
Title
Filter by category:
Call for Proposals 176
Capacities 21
Cooperation 74
Euratom 3
Ideas 10
People 68

Figure 71: Feed Subscription on Internet Explorer

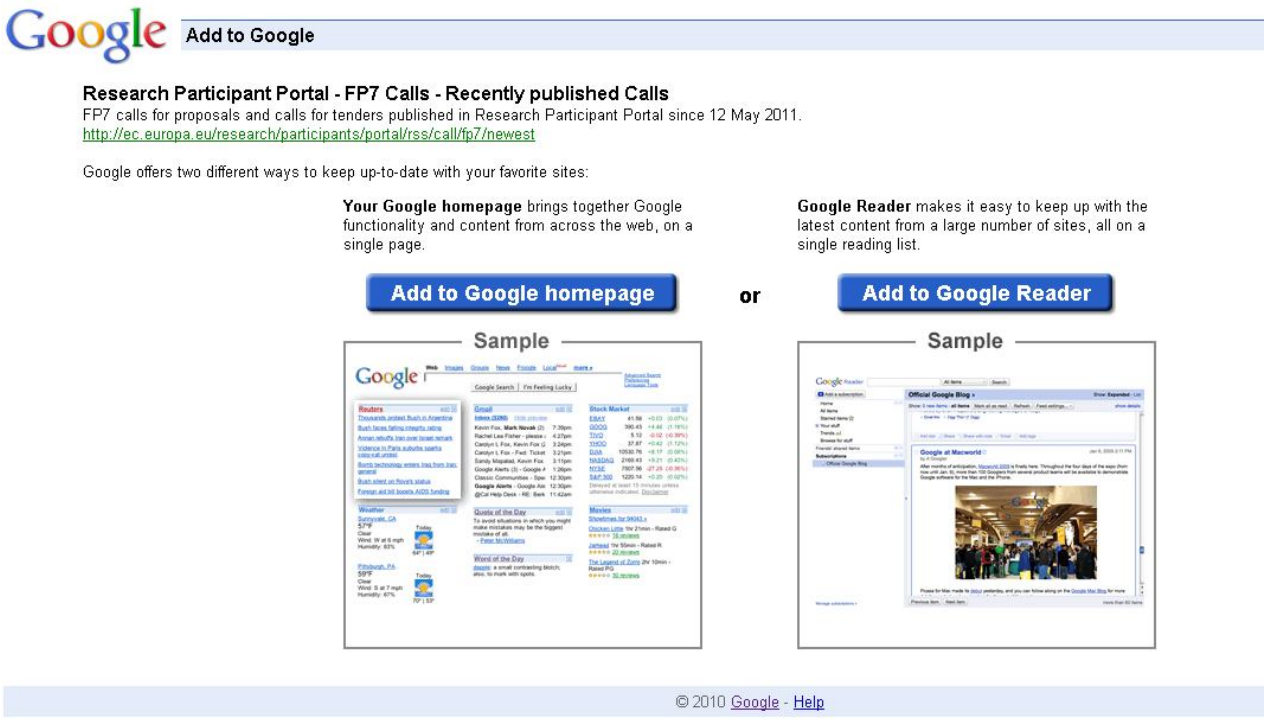

Google
Add to Google
Research Participant Portal - FP7 Calls - Recently published Calls
FP7 calls for proposals and calls for tenders published in Research Participant Portal since 12 May 2011.
http://ec.europa.eu/research/participants/portal/rss/call/fp7/newest
Google offers two different ways to keep up-to-date with your favorite sites:
Your Google homepage brings together Google functionality and content from across the web, on a single page.
Google Reader makes it easy to keep up with the latest content from a large number of sites, all on a single reading list.
Add to Google homepage
or
Add to Google Reader
Sample
Sample
© 2010 Google - Help

Figure 72: Feed Subscription on Mozilla using Google

4 GLOSSARY

Term	Definition
FP7	7th Framework Programme of Research and Technological Development of the European Commission
CIP	Competitiveness and Innovation Programme
Coordinator	The participants' coordinator in a consortium
EC Officer	European Commission's Project/Scientific Officer or Administrative Officer representing the European Commission during the negotiations.
NEF	The negotiation process is supported by the online Negotiation Facility tool (NEF), an electronic implementation of the negotiation forms used to exchange information between the participants and the European Commission. NEF provides the main channel for interactive communication between the Consortium and the EC Project Officer as all necessary administrative and financial data about the projects and the participants is collected and agreed through NEF.
Negotiation	Concerns one stage of the procedure applicable immediately after a favourable evaluation. The negotiation is a process during which the details about the proposal are agreed between the participants and the Commission. The participants of proposals that may be selected will receive a request to provide further information Negotiation covers three areas : - scientific negotiation - financial negotiation - contractual negotiation
Negotiation session	A period during which the coordinators are allowed to provide changes on their proposals
PIC (Participant Identity Code)	Participant Identity Code (The unique ID of an organisation) Unique Identifier for an organisation – obtained through URF registration & used in each step of the process to identify an organisation. The Temporary PIC received directly after URF registration and Validated PIC (VS has validated the data & legal documents of the organisation) are the exact same number: 9 digits starting with 99…and will remain the same during the entire existence of its organisation.
URF	Unique Registration Facility: a service providing unique registration for participants in the Framework Programmes at proposal and contract stages. It encompasses a set of rules for data acquisition and validation.

LEAR	A legal signatory of each legal entity will be asked by the Commission to appoint one person (the so-called LEAR - Legal Entity Appointed Representative) for being the correspondent towards the Commission on all issues related to the legal status of the entity. The LEAR provides the Commission with up-to-date legal and financial data (including supporting documents, where necessary) and commits to maintain the account so that it is up-to-date enabling future use for grants and other transactions between the entity and the Commission research (and other) programmes. This person is chosen by the organisation itself in order to ease the communication with the E.C. & avoid double registrations. Only the LEAR may do a Change request (of his organisation's data) through URF and submit legal documents through URF.
Status of validation	Indicates that data provided in a form have been validated by the Commission.
Participant Portal	The Participant Portal hosts services that facilitate the monitoring and the management of the participants' proposals and projects. It is a secure Internet site that ensures adequate authentication and confidentiality mechanisms, based on the European Commission Authentication Service (ECAS).
Participant	Any entity, legal or otherwise, that has some dealings with FP or CIP programmes. For example: Legal Entity as partner to a grant agreement, department or institute of such, person working in participating organisation and relevant to the programmes, expert. Participants are external to the Commission. In order to structure this participant concept into further details, a clear distinction should be made between: The *"executing participant"* proposing and executing an action (e.g. a department within a university or an independent expert) The *"participating legal entity"* endorsing the responsibility of this proposition and execution (e.g. a university or the expert as a legal natural person). "A participating legal entity is any Legal Entity that has participated, participates, or will participate in the programmes of FP and CIP, whether in Grant Agreements, contracts or proposals only" (List of Agreements PDM/URF WG, as of 14th January 2007). *"Contacts"* by the executing participants and participating legal entities for exchange of information (e.g. a professor within the university department, the financial officer of the university, an expert him/herself, etc.). Contacts typically play roles within participating entities and may have a specific address. It is worth noting that the "executing participant" and the "participating legal entity" can be the same entity (e.g. a private company) or that several legal entities could collectively endorse the responsibility for a single executing participant (case of a consortium).